# PANEL PACKET

## November 2021





#### **PANEL NOTICE/AGENDA**

#### Friday, November 19, 2021 9:30 a.m.

#### VIRTUAL MEETING

Attention: In accordance with Government Code section 11133, this Panel Meeting will not have a physical presence; but rather, this Panel Meeting will be held through teleconferencing as noticed herein.

The Panel Meeting will be live streamed and open to the public on Zoom:

#### Join Zoom Meeting:

https://us06web.zoom.us/j/81547154991

Webinar ID: 815 4715 4991

One tap mobile: 888-363-4735 US Toll-free

Conference code: 212627

*Note: Representatives for the Proposals in this Panel Meeting are required to login to the webinar to answer Panel comment and questions.* 

\*All times indicated below and the order of business are approximate and subject to change

Webinar Login For assistance, login and raise your hand or contact mario.r Amanda.flores@etp.ca.gov	Amanda Flores gov or	
Webinar Instruction Intro Virtual: Audio-Amanda/Voice-Panel Only	9:30am	Amanda Flores
Call to Order by Acting Chairperson Virtual: Audio-Janice/Voice-Panel Only • Roll Call Hand-Raise Pause for Public Comment-Amanda • Action to Approve November Panel • Action to Approve October Panel	0	•
Executive Report Virtual: Audio-Reg/Peter/Jaime/Tara/Michael/Voice-Panel C • Legislative/Budget/Other • Budget Update and Action on All • Request Motion to Adopt Conser Calendar Projects/Action	locations	Reg Javier Peter Cooper Tara Armstrong Michael Cable Jaime Guiterrez

Review and Action on Proposals Virtual: Audio-Presenters/ Voice-Presenters & Panel and Contractors (if needed) Virtual: Hand-Raise Pause for Public Comment-Amanda Diana Torres Ryan Swier Robert Meyer Chris Hoover Jana Lazarewicz

Opportunity for Panel Members to Request Agenda Items for Future Panel Meetings Virtual: Voice available for Panel Only

Public Comment on Matters Not on the Agenda Virtual: Hand-Raise for Public Comment via Voice - Amanda

Public Meeting Adjourns

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

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

The meeting is accessible to the physically disabled. A person who needs a disabilityrelated accommodation or modification in order to participate in the meeting, including without limitation auxiliary aids or services, may make a request by contacting Michael A. Cable, Staff Attorney, at (916) 327-5422, or Michael.Cable@etp.ca.gov, or sending a written request to Michael A. Cable, Staff Attorney, at Employment Training Panel, 1100 J Street, 4th Floor, Sacramento, California 95814. Providing your request so that it is received at least five (5) business days before the meeting will help ensure availability of the requested accommodation. 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, November 15, 2021, although the Panel may still change the order at the meeting. In regards to those items indicated below as an Amendment, please note that the dollar amount only reflects the proposed amendment amount, and not the total funding amount for the contract. Funding proposals are reviewed by the Panel on a case-by-case basis, and any action on a funding proposal shall not be binding on any other funding proposal.

#### \*All proposals listed are funded under the ETP Expansion Funds Program.

#### North Hollywood Regional Office

District Council 16 Northern California Journeymen and	
Apprentice Training Trust Fund - Glaziers	\$588,453
Employed Security Service Center, Inc	\$269,400
Lockheed Martin Corporation	\$499,744
MAG Aerospace Industries, LLC	\$148,120
Providence West Valley Healthcare Center, LLC	\$499,560
S Bravo Systems, Inc	\$132,365
Schilling Paradise Corp	\$322,575
South Bay Workforce Investment Board, Inc	\$590,780
Tile, Marble and Terrazzo Employees Joint Apprenticeship	
Training Committee Trust	\$242,201
Ventura County Electrical Joint Apprenticeship and Training	
Trust Fund	\$233,550

#### San Diego Regional Office

A. Preman Roofing, Inc	\$199,479
Amcor Rigid Packaging USA, LLC	\$477,135
Applied Materials, Inc	\$498,640
Global Power Group, Inc	\$138,000
Kagome, Inc	\$244,260
Kirkhill, Inc	\$468,050
Lam Research Corporation	\$494,500
Safran Passenger Innovations, LLC	\$199,410
Sundt Construction, Inc	\$93,150
UFCW Northern California Meat Apprenticeship Trust Fund	\$286,866
Unical Aviation, Inc	\$354,200
Wonderful Pistachios & Almonds LLC	\$499,744

#### Economic Development Unit

Apeel Technology, Inc. dba Apeel	
Sciences (RESPOND/Critical Proposal)	\$599,656
Applied Composite Structure, Inc. dba Encore	
Composite Structures, Inc	\$499,744
Quality Controlled Manufacturing, Inc	\$91,080

#### San Francisco Regional Office

Agilent Technologies, Inc	\$499,100
Alameda County Workforce Development Board	\$199,260
AWT Construction Group, Inc	\$144,532
BioMarin Pharmaceutical Inc	\$494,500
Intuitive Surgical, Inc	\$496,800
Northern California Surveyors Joint	
Apprenticeship Committee	\$475,210
On-Time Air Conditioning & Heating, LLC	\$400,200
Operating Engineers and Northern California Surveyors	
Pre-Apprenticeship, Apprenticeship and Journeyman	
Affirmative Action Training Fund	\$298,320
Santa Clara County Electrical Joint Apprenticeship and	
Training Trust	
Service Champions, LLC	\$345,000
Simpson Strong-Tie Company, Inc	\$249,941
Solano-Napa Counties Electrical Industry Apprenticeship	
& Training Trust	\$379,180
Stationary Engineers Northern California and Northern	
Nevada Apprenticeship and Training Trust Fund	\$598,752

#### Sacramento Regional Office

Bricklayers and Allied Craftworkers Local No.3 Apprentice	
Training Trust	\$131,134
Carpenters Training Trust Fund for Northern California	\$598,290
Cook General Engineering, Inc	\$90,229
HP Hood LLC	\$292,560
Keysight Technologies, Inc	\$494,500
Los Angeles County Electrical Educational and Training	
Trust Fund	\$594,830

#### Sacramento Regional Office (continued)

Luxer Corporation	· \$150,190
Nor-Cal Pipeline Services	· \$180,320
S. Martinelli & Company	· \$197,846
Schetter Electric, LLC	· \$186,760
Valley Communications, Inc	\$92,460
Vision Care Center, a Medical Group, Inc	· \$175,628

#### Program Projects Unit

Synergy Enterprises	, Inc	\$448,500
---------------------	-------	-----------

#### PROPOSALS APPROVED BY DELEGATION ORDER FOR 09/21/21 – 11/08/21

<u>&lt;</u> \$75,000	Approved Date	Approved Amount		
North Hollywood Regional Office				
O'Neil Digital Solutions, LLC	10/29/21	\$55,200		
National Veterans Chamber of Commerce	10/21/21	\$74,800		
San Diego Regional Office				
Gradelink Corp	10/13/21	\$38,180		
W C Heating & Air Conditioning, Inc. dba We Care	10/18/21	\$65,550		
San Francisco Regional Office				
Bivar, Inc. DeHart Plumbing, Heating, & Air, Inc.	11/04/21 11/05/21	\$33,810 \$40,250		
Program Projects Unit				
Delphon Industries, Inc.	11/05/21	\$52,440		



State of California—Labor and Workforce Development Agency

## **Employment Training Panel**

## **TABLE OF CONTENTS**

#### Panel Meeting of November 19, 2021

#### PRELIMINARY MATTERS

Future Meeting Sites Prior Meeting Minutes Key Program Elements Legislative Memo

#### **REVIEW AND ACTION ON PROPOSALS**

\*All proposals listed are funded under the ETP Expansion Funds Program.

Consent Calendar	Tab
A Dromon Decfing Inc	4
A. Preman Roofing, Inc.	
Agilent Technologies, Inc	
Alameda County Workforce Development Board	
Applied Materials, Inc	4
AWT Construction Group, Inc	
Bricklayers and Allied Craftworkers Local No.3 Apprentice Training Trust	
Carpenters Training Trust Fund for Northern California	7
Cook General Engineering, Inc	8
District Council 16 Northern California Journeymen and Apprentice Training	
Trust Fund - Glaziers	9
Global Power Group, Inc	10
HP Hood LLC	11
Intuitive Surgical, Inc	12
Lam Research Corporation	
Lockheed Martin Corporation	14
Los Angeles County Electrical Educational and Training Trust Fund	
Luxer Corporation	
MAG Aerospace Industries, LLC	
Nor-Cal Pipeline Services	
Northern California Surveyors Joint Apprenticeship Committee	
Operating Engineers and Northern California Surveyors Pre-Apprenticeship,	10
Apprenticeship and Journeyman Affirmative Action Training Fund	
Providence West Valley Healthcare Center, LLC	
Quality Controlled Manufacturing, Inc	
S Bravo Systems, Inc	23

Employed Security Service Center, Inc	51
<u>Proposals for Multiple-Employer Contractors</u> North Hollywood Regional Office	<u>Tab</u>
Sacramento Regional Office Keysight Technologies, Inc	50
Simpson Strong-Tie Company, Inc	49
Service Champions, LLC	48
On-Time Air Conditioning & Heating, LLC	47
San Francisco Regional Office BioMarin Pharmaceutical, Inc	46
Applied Composite Structure, Inc. dba Encore Composite Structures, Inc	
<i>Economic Development Unit</i> Apeel Technology, Inc. dba Apeel Sciences (RESPOND/Critical Proposal)	4/
Wonderful Pistachios & Almonds LLC	
Kagome, IncKirkhill, Inc	
San Diego Regional Office Amcor Rigid Packaging USA, LLC	40
North Hollywood Regional Office Schilling Paradise Corp	
Proposals for Single-Employer Contractors	Tab_
Vision Care Center, a Medical Group, Inc	38
Ventura County Electrical Joint Apprenticeship and Training Trust Fund	
Valley Communications, Inc	36
UFCW Northern California Meat Apprenticeship Trust Fund	
Committee Trust	
Synergy Enterprises, Inc Tile, Marble and Terrazzo Employees Joint Apprenticeship Training	32
Sundt Construction, Inc	
and Training Trust Fund	
South Bay Workforce Investment Board, IncStationary Engineers Northern California and Northern Nevada Apprenticeship	29
Solano-Napa Counties Electrical Industry Apprenticeship & Training Trust	
Schetter Electric, LLC	27
Santa Clara County Electrical Joint Apprenticeship and Training Trust	
S. Martinelli & CompanySafran Passenger Innovations, LLC	24

#### **SUMMARY OF DELEGATION ORDERS**

#### **Delegation Orders**

Tab

Bivar, Inc. DeHart Plumbing, Heating, & Air, Inc. Delphon Holdings, Inc. Gradelink Corp National Veterans Chamber of Commerce O'Neil Digital Solutions, LLC W C Heating & Air Conditioning, Inc. dba We Care





### Memorandum

To:	Panel Members	Date	November 19, 2021
From:	Reg Javier Director		

#### Subject: Future Meeting Sites

November Panel – November 19, 2021	Virtual Meeting
December Panel – December 17, 2021	Virtual Meeting



#### STATE OF CALIFORNIA EMPLOYMENT TRAINING PANEL

Zoom Virtual Meeting October 1, 2021

#### Panel Members

Janice Roberts Acting Chairperson

> Gloria Bell Member

Chris Dombrowski *Ex-Officio* Member

Ernesto Morales Member

Gretchen Newsom Member

> Rick Smiles Member

Douglas Tracy Member

Madison Hull Member

#### Executive Staff

Reg Javier Executive Director

Peter Cooper Assistant Director

Michael Cable Staff Attorney

#### STATE OF CALIFORNIA EMPLOYMENT TRAINING PANEL Zoom Virtual Meeting

October 1, 2021

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

Acting Chairperson Janice Roberts called the meeting to order at 9:31 a.m.

#### II. ROLL CALL

Present

Janice Roberts Gloria Bell Chris Dombrowski Gretchen Newsom Madison Hull Rick Smiles

<u>Absent</u> Douglas Tracy Ernesto Morales

<u>Executive Staff</u> Reg Javier, Executive Director Peter Cooper, Assistant Director Michael Cable, Staff Attorney

#### III. AGENDA

Acting Chairperson Roberts asked if the Panel Members reviewed the Agenda.

ACTION: Mr. Smiles moved and Ms. Newsom seconded approval of the Agenda. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative for approval of the Agenda.

Motion carried, 6 to 0.

#### IV. MINUTES

Acting Chairperson Roberts asked if the Panel Members reviewed the Meeting Minutes from the last Panel Meeting and stated that there might be a correction to the Meeting Minutes from the last Panel Meeting.

ACTION: Ms. Newsom moved and Mr. Smiles seconded the approval of the Meeting Minutes from the last panel meeting with a correction on page 25 of 34, under Item 25, the motion carried 7-0 not 8-0. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative for approval of the Meeting Minutes as corrected from the last panel meeting.

Motion carried, 6 to 0.

#### V. REPORT OF THE EXECUTIVE DIRECTOR

Mr. Javier welcomed the Panel Members, Applicants, and Stakeholders and recognized the following managers in attendance who will be presenting today's proposals: Chris Hoover, Foster City Manager, San Francisco Bay Area Regional Office, Manager; Diana Torres, Southern California District Manager; Ryan Swier, North Hollywood Regional Office Manager; and Jana Lazarewicz, Sacramento Regional Office Manager.

Mr. Javier stated that at today's Panel, there will be roughly \$8 million in 22 projects, which includes one Delegation Order.

Mr. Javier stated that at the last Panel Meeting, it was reported that ETP had been working on plans around the new monies that came to ETP via the state budget process and working on gaining statutory authority over those funds. That would mean ETP could use its current contracting processes versus having to put the money out via an RFP process. However, ETP has been planning an RFP in case it was unsuccessful in gaining the authorities sought.

To recap ETP's current status, Mr. Javier explained that ETP's Staff Attorney, Michael Cable, drafted a legal opinion on ETP's ability to classify the new monies, the general fund monies as what we call our "alternative funding", which gives the authority that we were looking for. Then, Mr. Gutierrez took that legal opinion to EDD's legal team, asked for their concurrence on our opinion, and they concurred. Next we took the opinion to the Labor Agency's Legal Counsel, Mark Pilotin, to get their concurrence, which we did with the support of Stuart Knox, Undersecretary of Labor. Now, due to receiving the Labor Agency's concurrence, ETP is allowed to use existing processes with the new monies. This means, we no longer have to run an RFP on any of the new monies and ETP will continue to use its current contracting processes to get this money out quickly. In order to exercise this authority, the code says that the Panel must adopt guidelines for each of the funding streams. So Peter, Heather, and Ryan will be presenting on those guidelines later on in the agenda. Essentially, once all the guidelines are approved, we can immediately augment our funding buckets, by basically taking the general fund monies, putting them into the funding most projects with the general fund monies, so that we can get contracts out as quick as possible.

Mr. Javier explained that at the last meeting he discussed ETP's core funding budget and how it was built on projections of the Employment Training Tax collections for last year. For obvious reasons, those projections were very low. However, the budget turned out to be higher than what was reflected in those projections - as much as \$20-25 million higher. So now ETP is doing two things. First, we're working with Agency to submit a BCP, a Budget Change Proposal, to increase our appropriations this year. ETP has a spending ceiling every year, and essentially we are now requesting an increase to our spending authority so that we would be able to increase our contracting capacity and put more money out into contracts this year. But we are facing a problem with timing. There is a chance ETP's BCP may not make it through the legislature in time to have it take effect for this fiscal year. Therefore, Staff is enacting a secondary plan at the same time, which is that our fiscal team is working through a series of drills in hopes that it can move resources around in a way that will allow an increase in contracting capacity within ETP's current budget framework. Hopefully, Staff will be able to add more monies to the core funding buckets in a few months. Staff will continue to update Shareholders as things progress.

Next Mr. Javier reported on ETP's new online application which launched the day before. Unfortunately, new tech launches often experience glitches at the start. Within minutes of the new application experiencing glitches, Tara and the development team were already working diligently

to resolve the issues, which they did. Staff appreciates applicants being patient during this time, because once past the initial glitches during the first hour of the day, the rest of the day ran smoothly. The Command Center was available all day to provide technical assistance and support to new applicants by answering questions and helping people get through their application process. But in the afternoon, they were no longer receiving calls because the application was running smoothly.

Mr. Javier expressed gratitude to the Cal-E-Force online application rollout team. Over the past couple months, they've increased the level of communication, trying to keep everybody informed. They've held multiple listening sessions and trainings, taking into account all the considerations and concerns they heard and using those to modify their processes, modify communication, increase the number of trainings, add new trainings, and new registration items. They did a great job and had created a successful rollout.

Mr. Javier shared that all Staff has been working very hard at making improvements to streamline the application process, not just the application itself, but the entirety of the process from the front door all the way to the Panel. One issue in that process is the first-in, first-out methodology of processing applications, which is one of the reasons why the Panel Packet looked a bit skewed recently. It had to with how the application window opened up back in May, but Staff has addressed that and from here on out, you'll see Panel Packets much more balanced and after you approve the guidelines today, it is likely you'll see Panel Packets literally double because we'll be opening the floodgates and all these applications are going to be flowing through to the Panel. But we still need to take a look at that process and figure out how to make it work better so that we can honor what the Panel wants to see in terms of applications and create some type of filtering mechanism. So, Staff is creating a workgroup to figure out a better way of prioritizing applications that go to Panel for approval. We want this workgroup to explore practices from across the country, discuss options, and really help develop a recommendation that could replace the first-in, first-out methodology or at the very minimum, modify it so that it honors all the things that the Panel has been asking to see in all of these proposals. Staff will then take that recommendation to the Panel via the Policy Committee for consideration.

Mr. Javier explained that the intent is for this workgroup to be made out of a couple Panel members, some staff, and then some of our stakeholders and contractors. Michael Cable, Staff Attorney, has begun a dive deep into the rules and regulations to figure out how many Panel members can actually participate in this workgroup without violating quorum issues or other regulations. So any Panel Members who might be interested in participating in this workgroup should send Willie Atkinson an email stating your interest. The same thing goes for our stakeholder and contracting community as well. Those who would like to participate in this workgroup, please send Willie Atkinson an email. Willie and Peter will be coordinating all the logistics around the workgroup, but will not be leading the workgroup. We're likely to bring in an outside facilitator to facilitate the dialogue, the discussions, and the decision making for the group. We don't want the group to be too large, but we also want the group to be large enough to have a good mix of folks participating that represent a broad array of perspectives, approaches, experience, knowledge, so that the recommendation that comes out of the group would honor that. Now to turn it over to our Chief Deputy Director, Jaime Gutierrez to do the budget report.

Acting Chairperson Roberts asked what the timing on getting the emails to Willie, regarding their interest in being on this workgroup.

Mr. Javier suggested that interested parties should send Willie an email within the next couple of weeks, then we can begin to comprise the workgroup. Then once we figure out the appropriate number of members, the entire list will be honed down to a good mix of folks that will be participating and begin communicating with them.

#### VI. REPORT OF THE ASSISTANT DIRECTOR

Mr. Gutierrez welcomed Panel Members and Stakeholders and provided a summary of the Employment Training Panel's funding.

#### Regarding Funding:

As Director Javier stated, todays Panel Meeting is for approximately \$8 million. If all the proposals scheduled for this Panel Meeting are funded today, the Panel will be approving 22 projects. That includes one project for \$70,380 in Delegation Orders. Delegation Orders are Proposals capped at \$75K and approved under delegated authority by the Director on a continuous flow basis. Since the last Panel Meeting, we have approved one Delegation Order. Prior to yesterday's application implementation we received approximately 527 pre-applications, with an estimated value of just over \$70M. Of those, 61 applications are in development with the Regional Offices. As of 9:30 a.m. today, we had 139 applications submitted through the new online system

#### Regarding GF Funding and increased contracting capacity:

Mr. Gutierrez shared that with the approval of the Expansion Funds and California Community College Guidance in this Panel Meeting, an additional \$55.5M in contracting capacity and a total contracting capacity of \$100.5M will be provided. We also have PFL (\$1M) and Social Entrepreneurs for Economic Development (SEED) (\$18M) funds that are separate but will require Panel approval in the future.

#### Regarding Demand and Allocations:

Mr. Gutierrez also shared that ETP is currently within the allocations of \$51.3M in demand for Single Employer Contracts, \$6.4M in demand for Multiple Employer Contractors (MEC) requests, \$6.9M in demand for Small Business, \$10.4M in demand for Apprenticeships, and \$0 in demand for Critical Proposals.

Mr. Gutierrez asked for a motion to approve the Consent Calendar.

Acting Chairperson Roberts asked if there were any other questions from the public or Panel regarding the Consent Calendar and asked for a motion.

Ms. Newsom requested to have further discussion on Tab No. 5 North State Electrical Contractors.

Mr. Javier stated that he believes they are also pulling Tab 2 Central Valley Roofers and Waterproofers from the Agenda completely.

Ms. Torres shared that there is a correction under Tab 1 California Fire Stop that their development fees should be \$10,000.

Acting Chairperson Roberts confirmed that Tab 2 is pulled and asked if there was a representative present to discuss the Panel's questions regarding Tab 5 North State Electrical Contractors.

Ms. Newsom asked the applicant why they have not paired with an apprenticeship when much of the work they conduct is related to construction and low voltage electrical work.

Jason Alexander, NSECI, explained that a lot of their training that involves audio visual technologies and energy systems are done independently of an apprenticeship program due to their manufacturer trainings and new product trainings which they don't really get in the classroom setting of a mentorship training.

Ms. Newsom asked about an occupation they have identified as Field Crew. She asked how many of those members are doing electrical work and are electricians or power professionals. Ms. Newsom pointed out that NSECI stated in their application that trainees require 140 hours of hands-on training due to the complexity of electrical installations and repairs, which seems to imply that they are electricians. Ms. Newsom asked how they are working with the workers to make sure they are on the path to becoming state certified journey-level sound persons with their training.

Mr. Alexander answered that it is all done by hands-on learning and in-house training from certified journeymen or general foremen superintendents. They are state-certified electrical trainings and get both classroom and field training, including 32 hours of education per year through an apprenticeship program. Mr. Alexander stated that 10% of their field is an apprenticeship program through WECA.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved for and Ms. Bell seconded the approval of the Consent Calendar, with the removal of Tab 2 and correction to Tab 1 as noted. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative for approval of the Consent Calendar as moved.

Motion carried, 6 to 0.

#### VII. REPORT OF THE ASSISTANT DIRECTOR

Peter Cooper reported that ETP now has a new spending authority that allows us to use the regular ETP process for applications and for spending the general fund dollars. The general fund dollars will give ETP additional contracting capacity of \$55.5M, but the Guidelines for use of the funds must pass before those funds can be used.

Mr. Cooper thanked Staff who worked hard to streamline these Guidelines and the application so that it will mirror the core program. This will move the funds out faster and make the process easy for applicants. Thanks to Diana Torres, Heather Miguel, Courtney Hoyt, Ryan Swier, Lis Testa, Jaime Gutierrez, Mario Maslac, Jennifer Lima, and Mike Cable.

Mr. Cooper reported that on September 15, 2021, a Policy Committee was held that focused on Guidelines for the Expansion Funds and the CCC Funds. The Guidelines have already been vetted by the Policy Committee and ETP Executive Staff; and Staff has made a few changes to the Guidelines in response to the Policy Committee's recommendations. Ryan Swier and Heather Miguel will report on the Policy Guidelines for these funds and ask for your input and approval later this morning. Also, later this morning, Lis Testa will give an update on the SEED and PFL programs.

Mr. Cooper stated that regarding the Community College and Expansion Funds, ETP is positioned to get these funds out very quickly and augment the funds in our core. Applicants

for these funds will use the same new Cal-E-Force application that went live yesterday. So, there will only be one application process regardless of funding source.

Mr. Cooper reported that since we want to get these new funds out as fast as possible, starting with the November Panel, all contracts will be funded out of the General Funds until that pot of money is used up. Then we will revert back to using the ETF.

#### VIII. REPORT ON CAL-E-FORCE ROLLOUT

Tara Armstrong gave a presentation on the launch of ETP's new system, Cal-E-Force. Regarding preparation, Ms. Armstrong reported that her team did nine webinars starting from Business Operations Sessions, Demonstrations, Training Sessions, and New Applicant-Only Sessions. The team did Application FAQs on the ETP website, Offline Templates (so people could gather necessary information before applications went live), Reference Materials (step-by-step procedures), and Stakeholder Email Blasts. Ms. Armstrong reported that these webinars reached 260 individual attendee logins and the team responded to over 550 questions.

Ms. Armstrong shared their rollout approach, which included live support via Zoom help desk, callin lines for questions, and a live Command Center for emails. All these support systems were staffed by people from operations and eligibility staff to marketing and technical staff.

Ms. Armstrong reported that the new system went live on Wednesday, September 29, 2021, just for registration to allow people to authenticate. At the very beginning of the day, there were two issues - one was a system link issues which caused a 35 minute delay for everyone, but the developer and ETP's system admins were ready to work to resolve the issue immediately. The second issue was that there were three fields that had a character limit issue, which was also resolved within the hour.

Ms. Armstrong provided statistics that as of Thursday, September 30, 2021, at 5 p.m., 107 applications had been submitted and 115 applications were in-progress. Ms. Armstrong reported that the live Zoom Command Center will remain open because that is currently the best resource to help customers. There will also be New Applicant Engagement and Terminology adjustment sessions and consideration of how ETP can make use of new technology at the first level of Eligibility Review and Pre-Information to Applicant.

Acting Chairperson Roberts asked what is the difference between an "in-progress" and "submitted" application.

Ms. Armstrong responded that "in-progress" or "in draft" means that the applicant is still working on the application and have not submitted it yet. Staff can see when the applicant begins entering the first piece of data, so the marketing team can reach out to those customers and ask how they are progressing or if they have any questions and provide support.

Acting Chairperson Roberts inquired about the follow up for those applicants who experienced the character limit issue during the launch.

Ms. Armstrong stated that Staff instructed those applicants to enter whatever they could within the field limitation and that Staff will work with the development analysts to add any additional information they may need later during development. But the issue wouldn't stop their applications from going through or compromise the applicant's place in line.

#### IX. REPORT OF STAFF ATTORNEY

Staff Attorney Michael Cable shared that since the original Legislation Memo was provided to the Panel, there has been a revised version which was also submitted and made available on the ETP website because there has been so many changes. Mr. Cable pointed out Chapter 165, AB 361 on page 2 of 10 that concerns open meetings. This bill was signed by the Governor and extends the executive order allowing ETP to have these Panel Meetings using electronics, such as Zoom. It should be noted that the bill is only effective until January 31, 2022. However, another bill is expected to be coming at some time in the future, which will likely be more comprehensive.

#### X. POLICY COMMITTEE MEETING REPORT TO PANEL

Ms. Newsom reported the ETP's Policy Committee met Wednesday, September 15, 2021 via Zoom. As mentioned earlier, Executive Director Reg Javier gave a funding update, discussing the current ETF allocation, a possible increase to that allocation, and the new alternative Expansion and California Community College funds, which will not be released through a Solicitation for Proposals process as was previously announced, but rather, will be handled through normal ETP contracting processes with some additional elements, as required by the founding Legislation for these funds.

Ms. Newsom reported Ryan Swier, North Hollywood Regional Office Manager, reviewed the new alternative California Community College Funds Guidelines, explaining some required elements for this funding that differ from our normal program.

Heather Miguel, Program Projects Unit Manager, reviewed the new alternative Expansion Funds guidelines. You will hear more about these two funding streams in a few moments.

Ms. Newsom then reported if anyone has a potential agenda topic for future Committee meetings, please email your suggestions, ideas or comments please email <u>Elisabeth.Testa@etp.ca.gov.</u>

#### XI. DISCUSSION OF EXPANSION FUNDS GUIDELINES

Heather Miguel, Manager of the Program Projects Unit, presented on the Expansion Fund Guidelines. The intention of these Guidelines is to closely mirror ETP's current contracting methods, while meeting the intent of the funding. These funds were awarded to ETP in SB 129 and consist of \$50 million in general fund dollars. With administrative costs taken into account, ETP will have approximately \$42.5 million in program funding to distribute. This funding was previously referred to as "Earn and Learn," so moving forward it will be called Expansion Funds and is available for expenditure or encumbrance until June 30, 2024.

Ms. Miguel shared that the Panel should expect to see projects at the November 2021 Panel Meeting for this Expansion Funding. Additionally, since these funds are general fund dollars and not coming from the Employment Training Fund, they are considered an alternative funding source. As such, ETP is required to create guidelines to support and implement the funding.

Ms. Miguel explained that while the Guidelines lay out some differences from the ETP core program, the overall goal is to align this funding as closely as possible to the ETP performancebased funding model. In addition, this funding aligns with ETP's mission to attract and retain businesses in California, including small businesses, and provide workers with secure jobs, good wages, and opportunities for advancement. In addition, these Guidelines will be consistent with the Panel's desire to expand funding to organizations that are relevant to the needs of the current workforce through equity, inclusivity, and future-oriented programs. This includes working with business, labor, and government partners and supporting high-road employers, licensing, and certifications and reaching those impacted by Covid-19.

Ms. Miguel shared ETP's requirement that it report to the Joint Legislative Budget Committee at two points: November 30, 2022, and then November 30, 2024. Listed under the Overview section in the Guidelines are the data elements that must be collected and reported, which mostly include data elements already being collected by ETP.

Ms. Miguel reiterated that these funds will be distributed in conjunction with ETP's core program and will follow the same standards, and if an exception is not stated under these Guidelines, then the core program policies and procedures will apply to these contracts. Further, with the Expansion Funds, Staff's assertion is that these monies will be allocated within the core program formula funding distribution to single and multiple employer contractors.

Ms. Miguel explained that the contract amount may be amended up to the program cap. Since this is one-time funding that must be spent or it will be lost, ETP must be able to amend contracts, up to the current cap, if a contractor is performing well. This flexibility assists the Agency in ensuring that the funds can be expanded or encumbered by the June 30, 2024 deadline.

Regarding Contractor Eligibility, Ms. Miguel explained that contractors will be able to apply for both core program dollars and Expansion Funds in a given fiscal year. However, the trainees from those two contracts may not receive training in both contracts at the same time. In ETP's core program, most contractors must pay the employment training tax in order to be eligible to enter into a training contract. However, the Expansion Funds do not require that an eligible contractor pay into this tax, which actually opens eligibility to contractors that ETP does not typically fund in our core program including nonprofit and public entities. All other ETP eligibility requirements apply.

Regarding Training Eligibility, Ms. Miguel explained that under ETP's current Job Creation policies, trainees are required to be placed into net new jobs. This requirement is removed for this funding in order to allow employers to utilize backfilled positions to count as Job Creation training. Ms. Miguel explained that Incidental Placement rules are reserved for MECs who placed trainees with entities that are not normally eligible for ETP funding and are typically capped at 20% of the training population, which usually includes nonprofits and public entities. However, since these entities are eligible for a contract under the expansion funding, the Incidental Placement Rules will not apply here to MECs.

Regarding Wage, ETP standard wage by county will apply for this funding, and SET wages will not apply.

Ms. Miguel explained that in order to meet some of the Legislative reporting requirements, ETP must collect the wage at the start of training to accurately gather information on participant wage gain. This will also be included in the terms and conditions of the contract for any of the Expansion Fund contractors. Regarding trainee wage verification, there is a possibility that people may not be able to verify trainees wages via its standard processes, if that is the case, the Guidelines provide that Staff may request payroll information from the contractor.

Regarding Record Keeping, Ms. Miguel stated that all training hours must be reported in ETP systems within 90 days of the delivery of training for two reasons: 1) it allows ETP staff to keep a close eye on contract performance to ensure overall program success because this funding must be spent within a limited amount of time, and 2) it ensures that ETP is able to report the most up-to-date information when required to report to the Legislature.

Ms. Miguel confirmed that all of these contracts will be subject to ETP standard monitoring and auditing processes, and if not otherwise specified in these Guidelines, ETP program standards apply.

Acting Chairperson Roberts asked if there will be alternative record keeping options available, like the ones in use now in some of the Covid projects. Ms. Miguel explained that ETP does allow for alternative record keeping and will recommend to contractors who are going to request alternative record keeping to discuss with their development or monitoring analyst, so that during development, it can be added to the proposal that comes before Panel.

Acting Chairperson Roberts also asked if these Guidelines are flexible regarding priority, nonpriority, and NAICS code eligibility. Ms. Miguel explained that the Guidelines are more flexible around some of the eligibility so some of those nonprofit and government entities will be eligible to apply, but ETP standard core program policies around priority industries will remain in place for this funding.

Ms. Newsom expressed gratitude for these new, broader Guidelines for use of the new monies, but reiterated that the Panel still wants to see really high quality proposals come before them.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Ms. Newsom moved for and Mr. Smiles seconded the approval of the Expansion Fund Guidelines. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative for approval of the Expansion Fund Guidelines.

Motion carried, 6 to 0.

#### XII. DISCUSSION OF CALIFORNIA COMMUNITY COLLEGE FUNDS GUIDELINES

Ryan Swier, Manager of the North Hollywood Regional Office, presented on the California Community College Funds Guidelines. Mr. Swier stated that he worked with key stakeholders, including the Chancellor's office, consortium members, the Community College Contract Education Units, and ETP Executive Staff. These funds were approved in SB 129 consisting of \$15 million in general funds. With administrative costs taken into account, ETP will have approximately \$13 million in program funding to distribute. This funding is available for encumbrance or expenditure until June 30, 2024.

Mr. Swier explained that the Guidelines for the Community College Funds are the same as the Expansion Funds, with two exceptions. Under Approved Amount on the second page, these Guidelines state that MEC program project caps do not apply. The reason for this is to ensure that these funds are fully utilized and all funding is contracted out to the colleges that apply. Staff will be right-sizing these projects based off the prior performance and the overall contractor's needs.

Mr. Swier stated that if these Guidelines are approved at today's Panel, ETP will open up the applications for a three-week window and close it on Friday, October 22, 2021, at 5:00 p.m. All funding proposals under these projected funds will go to the December 2021 (or possibly January 2022) Panel to fund out the entire \$13 million, which is planned to be exhausted all at once.

Mr. Swier explained that the other difference in Guidelines is under Contractor Eligibility, which states here that the contractor must be a California Community Contract Education Unit and be funded as a MEC. There will be no single employers under these funds.

Acting Chairperson Roberts asked if the Panel had any questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved for and Ms. Hull seconded approval of the California Community College Funds Guidelines. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative for approval of the California Community College Funds Guidelines.

Motion carried, 6 to 0.

#### XIII. UPDATE ON PFL SB AND SEED GRANTS

Lis Testa gave a report on the existing grants. The Paid Family Leave Small Business (PFL SB) Grant provides \$1M in General Fund dollars every year to ETP to assist small businesses who are affected by employees who are leave utilizing the PFL program to either bond with a new child or care for a sick family member. Those affected small businesses who have lost that employee for an extended period of time are eligible to receive a \$500 micro-grant which will hopefully help them offset the costs of training or hiring other employees to temporarily cover the duties of the employees who are out on the PFL.

Ms. Testa reported that in fiscal year 20/21, there were two awardees and their contracts have been fully executed, with a quarter of a million dollars so far having been distributed to them. joined These awardees together to create website application portal two а (www.CaliforniaPaidFamilyLeaveAlliance.com), they created flyers about the PFL SB grant in both English and Spanish, they have delivered six live presentation webinars to 100 small businesses, and many more marketing and education activities, including issuing 5 micro-grants to-date.

Ms. Testa reported that in fiscal year 21/22, ETP has received the million dollars for this year's PFL grant from the general fund and will be releasing a Solicitation for Proposals in October. Details will be announced on the ETP website and a stakeholder notification will also be sent announcing the opening of the application period.

Ms. Testa explained that the eligible population of small businesses for the micro-grants is very small because those small businesses have to have less than 10 employees. Staff is in the process of and have begun working on trying to create a referral network that will help get the eligible small businesses connected to the actual grant awardees. Staff is doing this by using company data from EDD's Labor Market Information Division and also their PFL Division to try to help identify eligible small businesses and hopefully this will help funnel the eligible small businesses to these grant awardees so that they can apply for and receive their \$500 micro-grants.

Ms. Testa shared that Chris Hoover, San Francisco Regional Office Manager, has assumed management duties of this grant so he is now ETP's main PFL SB grant contact.

Acting Chairperson Roberts asked if there was \$1M granted last year and only a quarter of a million was awarded, what happened to the other \$750,000?

Ms. Testa explained that the way the funding is set up, there are multiple funding controls in place. The funds are dispersed in installments of 25% of their funding at a time, the first of which was dispersed right at the beginning of the grant so they would have enough money to make the web portal, make the flyers, and get their programs up and running. Once they have selected 25% of their total micro-grantees, then they can request another 25% of the funding.

Ms. Testa explained the second control is that ETP can take funds back if they have not performed as planned, which is in their contracts. If that happens, ETP has the ability to shift the funds from the non-performing awardee to either a new awardee or someone who is performing better.

Acting Chairperson Roberts inquired about raising the \$500 amount to \$1,000 to incentivize or another way of making this program more successful. Ms. Testa explained that they are looking into that and other issues. Acting Chairperson Roberts suggested that Staff look into changing this if ETP will continue to receive a \$1M grant every year.

Acting Chairperson Roberts asked if the Panel had any further questions. There were none.

Ms. Testa explained that the second grant, the Social Entrepreneurs for Economic Development (SEED) Grant, supports the entrepreneurship of immigrant and limited English proficient individuals through two grant programs: the Entrepreneurship Program, which provides entrepreneurial training, micro-grants, and technical assistance to aid in the formation of new small businesses; and the Demonstration Project, which provides entrepreneurial training, micro-grants.

Ms. Testa reported that for fiscal year 20/21, ETP received \$10M in general fund dollars through an inter-agency agreement with the California Workforce Development Board to run the grant program. A solicitation for proposals was launched in mid-January 2021. ETP received 51 applications and chose 9 final awardees whose contracts have been fully executed; 8 Entrepreneurship Program awardees and 1 Demonstration Project awardee. ETP has also launched a Community of Learning and Practice for all grant awardees and their partners to network together to share hints, tips, and strategies.

Ms. Testa reported that of the \$10M, \$2,162,500 has been distributed to-date. The SEED Grant has similar fund disbursement as the PFL SB Grant does, so they don't get all of their money up front, they have to meet certain benchmarks in order to continue to get funding and, like the PFL SB Grant, if they are not performing, the funds that they have not spend can be recalled.

Ms. Testa shared that today, the SEED awardees have done a lot of preliminary work done to establish their grant programs, including hiring personnel, developing training curriculum and training materials, and creating all of their outreach materials. They have conducted outreach to 328,900 people in 20 different languages. They have hired people they needed, they've set up their technical assistance contracts, set up their fund distribution systems, developed the applications to be used for their micro-grants, and have been conducting outreach.

Ms. Testa explained that the legislation for SEED requires that ETP have an independent evaluator and the search for that independent evaluator will launch within the next few months.

For an update on this fiscal year, Ms. Testa shared that the Legislature has allocated an additional \$20M to the SEED Grant which will go to the California Workforce Development Board. The Board

has requested ETP to continue running the SEED Grants, so Staff is in the process of working on a second inter-agency agreement. Once the inter-agency agreement has been executed, it will only give ETP permission to receive the money, it does not give ETP permission to spend the money. ETP will have to also apply for spending authority for that additional \$20M. And ETP is waiting for a legal determination to see if the SEED funding must go out through a competitive grant request for proposal process or not.

Ms. Testa shared that Jana Lazarewicz, Sacramento Regional Office Manager, has assumed management duties of this grant so she is now ETP's main SEED Grant contact.

Acting Chairperson Roberts inquired about how the nine awardees were chosen and how the next awardees will be chosen.

Ms. Testa explained that everyone who applied was eligible. Each application was scored on multiple levels, then the nine highest scoring applications were awarded.

Acting Chairperson Roberts asked if awardees can reapply before they've used their funds for the next set of SEED grants. Ms. Testa responded that that had not been set up yet. But if any of the current awardees are performing really well, there would be the option to give them extra funding so that they could continue to perform really well.

Acting Chairperson Roberts inquired about the administration fees. Ms. Testa shared that for the Entrepreneurship Program, which is the largest chunk of the SEED Grant and those are the people that are starting new small businesses, 75% of their money has to go towards micro-grants to form new businesses. So, 25% of the funding to use for everything else, like hiring people, printing things, getting technical assistance contracts, getting fund distribution things set up, training, and the like. So, they receive the 25% up front because they have to develop a whole curriculum and they have to get everything ready. Any remaining funds that they request will be only for the micro-grants, they're not getting any more admin money.

Acting Chairperson Roberts asked if ETP is getting any funds from this to help with their administration costs. Ms. Testa explained that from the first \$10M, ETP got \$350,000 as a 3.5% admin fee, which is low. For the \$20M, Staff is expecting to have a higher amount for admin, closer to 10 or 15% for ETP, so that would be anywhere from another \$2 - \$3 million for ETP. Ms. Testa shared that Staff is trying to get the grants into a grants management system as part of or attached to Cal-E-Force, which also has a cost involved, so those extra admin dollars would be very beneficial for us. Ms. Testa also shared that PFL and the STEPS grant were pro bono, but the SEED grant is not.

Ms. Newsom stated that for repeat contractors, she would want to see the success of those programs previously, and success here means the number of individuals that have enrolled and completed their training, the number of grants that have been given, and what the impact has been for that.

Ms. Testa stated that grantees would have to show high performance on their current grant in order to get any additional funding. Ms. Testa also shared that the grant awardees were awarded vastly different sizes of awards, the smallest being \$150,000 and the highest being around \$4M.

Acting Chairperson Roberts stated that she was a little disappointed in the imbalance of this Panel Packet, and thinks it may be due to the first-in, first-out in the May submittal process. Acting Chairperson Roberts pointed out that all the Single Employers in this Panel came from one subcontractor who was able to get all this information in May. Acting Chairperson Roberts stated

that she didn't like that he is getting a 10% cut on the development fees from each one of these small businesses, some of which are coming in for the first time, and the subcontractor was using the exact same template for all of them. Acting Chairperson Roberts stated she believed all those development fees were not warranted in this situation. ETP Staff and staff attorney are looking into how the development fees and registration fees could be combined.

Acting Chairperson Roberts also shared her concern about the amount of hours that were inputted into the apprenticeship programs and shared that some contractors and subcontractors reported that they did not have any guidelines regarding what hours were needed to be inputted. Acting Chairperson Roberts stated that what the Panel Members see is that it has been a year since they approved a contract and they are showing no hours, no performance, just a projection. The other MEC in the packet was able to get all their hours in, so Acting Chairperson Roberts wondered if they should make exceptions for apprenticeship programs or if apprenticeships need to also enter some type of hours in to give the Panel some legitimacy to their performance.

Mr. Cable added that Staff is reviewing language for the guidelines that are being prepared, specifically the 90-day data entry requirement. Mr. Cable suggested that some best practices there might be folded into ETP's regular program contracts. Staff is currently looking at the issue.

#### XIV. REVIEW AND ACTION ON PROPOSALS SINGLE EMPLOYER CONTRACTS

#### Tab No. 8: Iron Mechanical, Inc.

Ms. Lazarewicz presented a proposal on behalf of Iron Mechanical, Inc., who is requesting \$249,780 to train 307 workers, including 50 new employees and 15 veterans. Training will take place at their locations in Buena Park and Sacramento.

Ms. Lazarewicz stated that there are representatives here to answer any question that the Panel Members may have and introduced Judy Gomes, Controller; Jed Risse, CEO; and Mike Snead, Consultant, Carrazco Innovative Tax Solutions.

Ms. Newsom asked why Iron Mechanical is not performing their curriculum and training in conjunction with an apprenticeship program, since this is construction related.

Mr. Risse responded that they do have an apprenticeship program and the training they do is general contractor jobsite-specific, so it's not training that is normally taught in a classroom. They are also members of two state-approved training programs for apprentices. Mr. Risse confirmed that none of the trainees in this application are apprentices, but they do have apprentices.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Ms. Bell moved and Mr. Smiles seconded approval of the proposal submitted by Iron Mechanical, Inc. in the amount of \$249,780. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Iron Mechanical, Inc. in the amount of \$249,780.

Motion carried, 6 to 0.

#### XV. REVIEW AND ACTION ON PROPOSALS MULTIPLE EMPLOYER CONTRACTS

## Tab No. 9: Laborers Training, Retraining and Apprenticeship Trust of Southern California (The Laborers School)

Mr. Swier presented a proposal on behalf of the Laborers Training, Retraining and Apprenticeship Trust of Southern California (The Laborers School). They are a Repeat Contractor requesting \$596,610 to train 103 journeyworkers and 346 apprentices, 20 of which are under a veterans job number. All training will be located in Southern California. Please note that the development of this project is under active projects, they do have two open contracts and another one under prior contracts that are all under 42% of the hours tracked for potential contractor earnings. However, the contractor is estimating final earnings of 100% based off the training currently committed to employers on all three agreements.

Mr. Swier stated that there are representatives here to answer any question that the Panel Members may have and introduced Sarah Gordon, Administration; Lisa Beccera, Executive Assistant; Betty Alvarado, Bookkeeping; and Kelly Greer, Consultant.

Ms. Newsom asked the applicant to address some of the concerns that were raised by Madam Chair earlier as to tracking their progress and submitting hours for their current and outstanding contracts. Acting Chairperson Roberts reiterated that to the Panel, it appears that they have three open contracts with no information and no projections.

Kelly Greer explained that the information in the Panel Packets was slightly outdated and they actually have 72% of the information uploaded for one project, 37% information uploaded for their second project, and for both of those projects they have over 100% in their database. Ms. Greer stated that the issue is that ETP's system of invoicing prevents inputting trainees into a new project until they have 100% completed their previous project, which slows them down from being added into the second project. However, Ms. Greer stated that she appreciates ETP's way of doing this because it allows them to make sure they are not double enrolling trainees into both projects, but it does create less ability to actually show performance. Ms. Greer stated that in the past, they have asked ETP staff if it would be possible to show their database records, so that they can at least show performance, and she would like to ask the Panel and ETP staff to reconsider that as an option. Ms. Greer also noted that she appreciates how the new system makes sure that when payments are made, 100% of it has been earned so that no money will have to be returned, but that also slows down their ability to upload hours.

Acting Chairperson Roberts asked if it wouldn't be wise to just wait until those apprenticeship projects are closed out before they reapply because she is seeing them applying before even a year is up. Acting Chairperson Roberts stated that she has seen Ms. Greer's projects coming in within 9 months, just to get the application in, but may not have finished training yet. Staff holds other MECS accountable for getting all their trainees through before they reapply, so Acting Chairperson Roberts asked why Ms. Greer's projects should be treated any differently.

Ms. Greer explained that most apprenticeship programs run on an academic year, starting in August and finishing in June or July. Ms. Greer shared that all of the ETP funding is used up in that one academic year, but it takes them a long time to collect the retention information. For example, they might finish in June, then it takes them a month or two to get the work hours from the third party that keeps track of all the apprenticeship work hours, which means they would get those hours in August. Then it takes two weeks to a month for them to process all that information. So, by the time it gets to ETP, it's now been five months since the training date has ended and they can't invoice for both the training and the close-out, they must do them one at a time. Ms. Greer stated that if they were to wait for a contract to completely close out, it would mean that those trainings that started in August, would not be able to be funded. Ms. Greer suggested

creating a diagram to further explain to the Panel the timing of apprenticeship training and why they must use the timeline that they do.

Ms. Newsom asked if Ms. Greer could include in the diagram the nuance of the new apprenticeship cohorts coming on and then the new apprentices as they advance through in their curriculum, because apprenticeships are multi-year similar to college.

Acting Chairperson Roberts asked if Ms. Greer was shorthanded and why they are not able to get the paperwork in so that the Panel can see some data.

Ms. Greer responded that they are not shorthanded and that her group submitted 39 of the 107 applications that were submitted.

Sara Gordon, SoCal Laborers, suggested that to the chart Kelly is creating, that she should include their past performances so Panel Members can see that they have a very good track record of using all the funds that they receive.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Ms. Newsom moved and Ms. Hull seconded approval of the proposal submitted by Laborers Training, Retraining and Apprenticeship Trust of Southern California in the amount of \$596,610. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Laborers Training, Retraining and Apprenticeship Trust of Southern California in the amount of \$596,610.

Motion carried, 6 to 0.

## Tab No. 10: Local Union 250 of the Southern California Pipe Trades District Council No. 16 of the United Association

Mr. Swier presented a proposal on behalf of the Local Union 250 of the Southern California Pipe Trades District Council No. 16 of the United Association. They are a Repeat Contractor requesting \$598,290 to train 259 apprentices, all located in Southern California. Their current active contract has been tracked for 50% of the approved amount, however the contract projects final earnings of 100% based off training currently committed to employers and in process through September of 2021.

Mr. Swier stated that there are representatives here to answer any question that the Panel Members may have and introduced David Payne-Fitter, Training Coordinator and Steve Duscha, Consultant.

Acting Chairperson Roberts asked if the Panel had any questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved and Ms. Bell seconded approval of the proposal submitted by Local Union 250 of the Southern California Pipe Trades District Council No. 16 of the United Association in the amount of \$598,290. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal

submitted by Local Union 250 of the Southern California Pipe Trades District Council No. 16 of the United Association in the amount of \$598,290.

Motion carried, 6 to 0.

#### Tab No. 11: Los Angeles and Orange Counties Air Conditioning and Refrigeration JJATC

Mr. Swier presented a proposal on behalf of the Local Union 250 of the Southern California Pipe Trades District Council No. 16 of the United Association. They are a Repeat Contractor requesting \$598,770 to train 223 apprentices, 52 journeyworkers, and 20 Retrainees all located in Southern California. Their current active contract shows no hours tracked in the ETP system, however, they expect to have hours tracked by September 17, 2021. Please note, the Contractor states that the data upload hours has been delayed due to processing of its last contract, however, overall they expect 100% of potential earnings once hours are tracked.

Mr. Swier stated that there are representatives here to answer any question that the Panel Members may have and introduced Simon Cote, Director of Training and Steve Duscha, Consultant.

Ms. Newsom asked if this Local 250 project is different from the Tab 10 Local 250 project.

Simon Cote explained that one project is a steamfitter, plumber, pipefitter local and the other is a refrigeration HVAC service local.

Steve Duscha added that the information on the 130 is out of date and they have uploaded 86% of the training hours.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Ms. Newsom moved and Ms. Bell seconded approval of the proposal submitted Los Angeles and Orange Counties Air Conditioning and Refrigeration JJATC in the amount of \$598,770. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Los Angeles and Orange Counties Air Conditioning and Refrigeration JJATC in the amount of \$598,770.

Motion carried, 6 to 0.

#### Tab No. 12: Tri-Counties Sheet Metal Workers JATC

Mr. Swier presented a proposal on behalf of the Tri-Counties Sheet Metal Workers JATC. They are a Repeat Contractor requesting \$212,572 to train 9 journeyworkers and 53 apprenticeship trainees, 5 of which are located under a veterans job number. Training will take place in Ventura and Santa Maria.

Mr. Swier stated that there are representatives here to answer any question that the Panel Members may have and introduced Brian Hill, Training Coordinator – Tri-Counties; Andree Cameron, Office Manager- Tri-Counties; John Brauer, Director – California Labor Federation; Kelly Greer, Consultant – Strategy Workplace Communications.

Acting Chairperson Roberts asked if the Panel had any questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Ms. Hull moved and Ms. Newsom seconded approval of the proposal submitted Tri-Counties Sheet Metal Workers JATC in the amount of \$212,572. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Tri-Counties Sheet Metal Workers JATC in the amount of \$212,572.

Motion carried, 6 to 0.

#### Tab No. 13: Glaziers, Architectural Metal and Glass Workers Local Union No. 636

Ms. Torres presented a proposal on behalf of the Glaziers, Architectural Metal and Glass Workers Local Union No. 636. They are a Repeat Contractor requesting \$484,400 to train approximately 200 apprentices and 70 journeyworkers. Glazier's Local works with Helmets to Hardhats to actively market to veterans and they do not have a separate job number for veterans, however, they do plan to have veterans participate in this project. Currently, there are 8 veterans in their program. They have been approved to use a learning management system and with regard to their active project that they started in December 2020, they currently have 52% of training hours completed.

Ms. Torres stated that there are representatives here to answer any question that the Panel Members may have and introduced Mike Galstaun, Coordinator and Steve Duscha, Consultant.

Acting Chairperson Roberts asked if the Panel had any questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved and Ms. Bell seconded approval of the proposal submitted Glaziers, Architectural Metal and Glass Workers Local Union No. 636 in the amount of \$484,400. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Glaziers, Architectural Metal and Glass Workers Local Union No. 636 in the amount of \$484,400.

Motion carried, 6 to 0.

#### Tab No. 14: <u>N.E.C.A./I.B.E.W. Inland Training Fund</u>

Ms. Torres presented a proposal on behalf of the N.E.C.A./I.B.E.W. Inland Training Fund. This is supported by the International Brotherhood of Electrical Workers Local 440 and Local 477. They are requesting \$596,494 to train approximately 15 journeyworkers and 304 apprentices from Local 440, Local 477, as well as a veterans job numbers for both. This proposal includes expected participation of 13 ventured apprentices, they work with Helmets to Hardhats to actively recruit veteran applicants, and they actively recruit woman through a partnership with Women in Non-Traditional Employment Roles which prepares them for careers in the construction industry. The Contractor also works with bootcamps at local high schools and their Local 440 has hired a resource development staff member who was responsible for participation and Career Day events, as well as connecting with individual entities who can help increase women recruitment.

Ms. Torres explained, with regard to their active project, they have tracked the equivalent of earnings of 100% of their approved amount for a project that has had approximately 12 months and expected to term in August 2022.

Ms. Torres stated that there are representatives here to answer any question that the Panel Members may have and introduced Rick Purper, Training Director and Kelly Greer, Consultant.

Acting Chairperson Roberts asked if the Panel had any questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved and Ms. Bell seconded approval of the proposal submitted N.E.C.A./I.B.E.W. Inland Training Fund in the amount of \$596,494. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by N.E.C.A./I.B.E.W. Inland Training Fund in the amount of \$596,494.

Motion carried, 6 to 0.

#### Tab No. 15: United Association Local Union 342

Ms. Torres presented a proposal on behalf of the United Association Local Union 342. This is supported by the United Association of Journeymen and Apprentices of Plumbing and Pipe Fitting of the United States and Canada Local 342. They are requesting \$599,251 to train approximately 72 journeyworkers and 263 apprentices. The UA Local 342 recruits veterans and works with Helmets to Hardhats and Veterans in Piping ("VIP Program") and currently have veterans who are direct resu4lts of this recruitment. They do not have a separate veterans job number, but are actively recruiting veterans. UA Local 342 also actively recruits, hires, and incentivizes women to join the apprenticeship program and partners with local organizations such as the Oakland Chapter of Tradeswomen and Rising Sun Center for Opportunity. It also sponsors delegates to 10 National Women in Construction events. Regarding their current active projects, one is scheduled to complete in December 2022 and there are no hours shown yet, however, Staff did receive information from their administrator a few days ago. Their other project has the equivalent of 100% of the agreement amount.

Ms. Torres stated that there are representatives here to answer any question that the Panel Members may have and introduced Al Garcia, Kim Acosta, and Steve Duscha.

Acting Chairperson Roberts asked if the Panel had any questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved and Ms. Newsom seconded approval of the proposal submitted United Association Local Union 342 in the amount of \$599,251. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by United Association Local Union 342 Fund in the amount of \$599,251.

Motion carried, 6 to 0.

## Tab No. 16: Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund

Mr. Hoover presented a proposal on behalf of the Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund. They are supported by the United Union of Roofers, Waterproofers, and Allied Workers Local 40, 81, and 95. This is a Priority Industry and Repeat Contractor requesting \$599,820 to train approximately 30 trainees under Job 1 for journeyworkers and 252 trainees under Job 2 for apprentices. Training will be delivered at the Bay Area Roofers training facility in Livermore. This will be the Bay Area Roofers 7<sup>th</sup> ETP contract and its 5<sup>th</sup> in the last five years. Even though the Bay Area Roofers are committed to training veterans, the JATC is not including a veteran job number in this project at this time for ease of project administration. Bay Area Roofers participates in Helmets to Hardhats and gives veterans accelerated admission to its apprenticeship program.

Mr. Hoover stated that there are representatives here to answer any question that the Panel Members may have and introduced Dan Smith, Director of Training and Steve Duscha, Consultant.

Acting Chairperson Roberts asked if the Panel had any questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Ms. Newsom moved and Mr. Smiles seconded approval of the proposal submitted Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund in the amount of \$599,820. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund in the amount of \$599,820.

Motion carried, 6 to 0.

## Tab No. 17: Northern California Elevator Industry Joint Apprenticeship Training Committee Trust Fund

Mr. Hoover presented a proposal on behalf of the Northern California Elevator Industry Joint Apprenticeship Training Committee Trust Fund. They are supported by the International Union of Elevator Constructors Local Union No. 8. This is a Priority Industry and Repeat Contractor requesting \$599,872 to train approximately 67 trainees under Job 1 for journeyworkers and 254 trainees under Job 2 for apprentices. Training will be delivered at NorCal Elevator JATC's headquarters in San Francisco or one of its leased facilities in Martinez, Sacramento, Santa Clara, or Marin. This will be the NorCal Elevator JATC's 4<sup>th</sup> ETP contract and its 4<sup>th</sup> in the last five years. Even though the NorCal Elevator JATC is committed to training veterans, the JATC is not including a veteran job number in this project at this time for ease of project administration. Bay Area Roofers participates in Helmets to Hardhats and gives veterans accelerated admission to its apprenticeship program.

Mr. Hoover stated that there are representatives here to answer any question that the Panel Members may have and introduced Joel Roberts, National Elevator Industry Educational Program Area Coordinator and Steve Duscha, Consultant.

Acting Chairperson Roberts asked if the Panel had any questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved and Ms. Hull seconded approval of the proposal submitted Northern California Elevator Industry Joint Apprenticeship Training Committee Trust Fund in the amount of \$599,872. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Northern California Elevator Industry Joint Apprenticeship Training Committee Trust Fund in the amount of \$599,872.

Motion carried, 6 to 0.

## Tab No. 18: Pipe Trades Apprentice and Journeymen Training Trust Fund for San Mateo County

Mr. Hoover presented a proposal on behalf of the Pipe Trades Apprentice and Journeymen Training Trust Fund for San Mateo County. They are supported by the United Association Journeymen and Apprentices of the Plumbing and Pipefitting Industry of the United States and Canada UA Local No. 467. This is a Priority Industry and Repeat Contractor requesting \$588,468 to train approximately 10 trainees under Job 1 for journeyworkers, 147 under Job 2 for apprentices, and 3 under Job 3 for veteran apprentices. Training will be delivered at their training center in Burlingame. This will be the JATC's 6<sup>th</sup> ETP contract and its 6<sup>th</sup> in the last five years. Pipe Trades AJTTF for San Mateo is committed to including 3 apprentices that are veterans and to support jobrelated training that helps veterans transition into California's workforce. This AJTTF recruits veterans in cooperation with Helmets to Hardhats. The Panel has established other incentives for training California veterans, including making available higher support costs to reach these participants for this project.

Mr. Hoover stated that there are representatives here to answer any question that the Panel Members may have and introduced Stephan Schnell, Director of Training; Kelly Greer, Director, Strategy Workplace Communications; and John Brauer, Director, WED, Cal Labor Federation.

Acting Chairperson Roberts inquired why their prior project only shows 73% when it was projected to be 100%, close out was three months ago, and retention was seven months ago. Ms. Greer responded that there is a lag between when they write the applications and they get posted. Ms. Greer shared that previously, they would provide updates on performance to Staff and they would be added to the presentations at the Panel Meetings, but that hasn't been happening recently. Ms. Greer explained that at retention, they have to wait about one to two months for the third party to give them those work hours because they're collecting them from all of the employers that are signatories with this JATC. They will get those hours toward the end of August, then it takes anywhere from two weeks to a month and a half to get that all entered into the ETP system because they have to double check and make sure that we're not double dipping or using people's hours from a previous contract. Then after that is submitted to ETP's fiscal unit, they are only allowed to invoice for the training part. Ms. Greer explained that in the past, they were allowed to invoice for the training part and the closeout. So, now they get them in in September, then have to wait one to three months for ETP staff to process that training invoice. Then after Staff processes that training invoice, they can then submit the invoice for closeout which will take from one to two months before to go through. Acting Chairperson Roberts said she is looking forward to the diagram that Ms. Greer will be creating to illustrate the timing of apprenticeships to share with the Panel.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Ms. Newsom moved and Mr. Smiles seconded approval of the proposal submitted Pipe Trades Apprentice and Journeymen Training Trust Fund for San Mateo County in the amount of \$588,468. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Pipe Trades Apprentice and Journeymen Training Trust Fund for San Mateo County in the amount of \$588,468.

Motion carried, 6 to 0.

#### Tab No. 19: <u>Redwood Empire Electrical Joint Apprenticeship Trust</u>

Mr. Hoover presented a proposal on behalf of the Redwood Empire Electrical Joint Apprenticeship Trust. They are supported by the International Brotherhood of Electrical Workers Local 551. This is a Priority Industry and Repeat Contractor requesting \$348,380 to train approximately 85 trainees under Job 1 for apprentices and 5 trainees under Job 2 veteran apprentices. Training will be delivered at the Redwood Empire Electrical Training Center in Santa Rosa. This will be the Redwood Empire Electrical's 2<sup>nd</sup> ETP contract and its 2<sup>nd</sup> in the last five years. Redwood Empire Electrical recruits veterans in cooperation with Helmets to Hardhats. The Panel has established other incentives for training California veterans, including making available higher support costs to reach these participants for this project.

Mr. Hoover stated that there are representatives here to answer any question that the Panel Members may have and introduced Rob Barsi, Training Director 9; Kelly Greer, Director, Strategy Workplace Communications; and John Brauer, Director, WED, Cal Labor Federation.

Ms. Newsom pointed out that their application states that they've graduated 350,000 apprentices to journey-level status and asked if that was all from just their Local chapter. Mr. Barsi responded that number of graduates comes from IBEW as a whole. Mr. Barsi explained that their JATC has been doing this for 41 years and they have an average of 12 per year.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved and Ms. Hull seconded approval of the proposal submitted Redwood Empire Electrical Joint Apprenticeship Trust in the amount of \$348,380. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Redwood Empire Electrical Joint Apprenticeship Trust in the amount of \$348,380.

Motion carried, 6 to 0.

## Tab No. 20: Central Valley – Mother Lode Plumbers, Pipe, and Refrigeration Fitters Joint Apprenticeship Training Committee

Ms. Lazarewicz presented a proposal on behalf of the Central Valley – Mother Lode Plumbers, Pipe, and Refrigeration Fitters Joint Apprenticeship Training Committee. They are requesting \$293,970 to train journeyworkers, apprentices, and veteran apprentices. Central Valley – Mother Lode operates in San Joaquin and Stanislaus Counties.

Ms. Lazarewicz stated that there are representatives here to answer any question that the Panel Members may have and introduced Greg Vincelet, Training Director; Kelly Greer, Strategy Workplace; and John Brauer, Cal Labor Federation.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Ms. Hull moved and Ms. Newsom seconded approval of the proposal submitted Central Valley - Mother Lode Plumbers, Pipe, and Refrigeration Fitters Joint Apprenticeship Training Committee in the amount of \$293,970. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Central Valley - Mother Lode Plumbers, Pipe, and Refrigeration Fitters Joint Apprenticeship Training Committee in the amount of \$293,970.

Motion carried, 6 to 0.

#### Tab No. 21: Greater San Fernando Valley Chamber of Commerce

Ms. Lazarewicz presented a proposal on behalf of the Greater San Fernando Valley Chamber of Commerce. They are a Repeat Contractor requesting \$599,428 to train 554 workers throughout the State of California. The Chamber provides a variety of business services and programs targeted to help small, large, micro, women, veterans, and minority-owned businesses.

Ms. Lazarewicz stated that there are representatives here to answer any question that the Panel Members may have and introduced Nancy Hoffman Vanyek, CEO and Deborah Imonti, Consultant.

Acting Chairperson Roberts thanked them for having a contract within one year and being able to get all their information in.

Acting Chairperson Roberts asked if the Panel had any more questions.

Hearing none, Acting Chairperson Roberts asked for a motion.

ACTION: Mr. Smiles moved and Ms. Newsom seconded approval of the proposal submitted Greater San Fernando Valley Chamber of Commerce in the amount of \$599,428. Acting Chairperson Roberts called for a vote, and all Panel Members present voted in the affirmative to approve the proposal submitted by Greater San Fernando Valley Chamber of Commerce in the amount of \$599,428.

Motion carried, 6 to 0.

#### XVI. OPPORTUNITY FOR PANEL MEMBERS TO REQUEST AGENDA ITEMS FOR FUTURE PANEL MEETINGS

Acting Chairperson Roberts asked for panel members to comment on agenda items for future panel meetings.

Ms. Bell stated she had a question regarding today's projects. Ms. Bell pointed out that of the 14 presented today, 100% of them are consultant driven. Ms. Bell inquired that of the new applications that came in, how many have consultants versus businesses submitting applications on their own.

Ms. Armstrong shared that of the 140 MEC projects that came in, 6 did not have a subcontractor and 41 Single Employer contracts did not have a subcontractor. Ms. Armstrong also shared that her team worked with a lot of first-time applicants during their training sessions and hope to simplify the process in the future so that fewer contractors will need subcontractors.

#### XVII. PUBLIC COMMENT ON MATTERS NOT ON THE AGENDA

Acting Chairperson Roberts asked for public comment on matters not on the Agenda.

Mr. Duscha shared that he had been skeptical of the Guidelines on Agenda today as they had been presented at the Policy Committee Meeting, but now understands how they are going to work and very much supports the Guidelines as the Panel has adopted them. Mr. Duscha also wanted to share his support for setting up a work group to figure out something better than the first-in, first-out model for applications.

Mr. Brauer stated that about five years ago, he shared a document with the Panel, that he would like to re-share, which makes some suggestions around the specifics of the apprenticeship model regarding work schedules and training schedules. He would like to bring that document back for discussion.

Ms. Greer thanked Staff for doing such a great job with setting up the new system. Ms. Greer said the training was well organized and clearly presented and the site itself was easy to navigate and easy to fill out. Ms. Greer thanked Staff for all their hard work.

Mr. Eldon Davidson added that he agreed with Mr. Duscha and thinks that instead of first-in, firstout, the process should be based on performance.

#### XVIII. MEETING ADJOURNMENT

Acting Chairperson Roberts adjourned the meeting at 11:56 a.m.

## Single Employer Contractor

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

- Unless funded under Special Employment Training (SET), a single employer must face out-of-state competition.
- > A single employer must be subject to the Employment Training Tax.
- The employer must also make an "in kind" contribution toward the cost of training, as follows: 1) 100 or fewer employees, at least 50% of the ETP-funded amount; 2) more than 100 employees, at least 100% of the ETP-funded amount.
- The employer must provide union letters of support for employees who are represented. The employer should also be able to show how the training will enhance job security and improve opportunities for advancement.
- A single employer must establish the need for the particular training curriculum proposed.
- The employer must establish its ongoing commitment to training and represent that ETP funds will not displace existing resources.
- > All single employer contracts are capped at \$500,000.

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 \$600,000 and are limited to one contract per Fiscal Year.

## 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:

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

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

## New Hire Training

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

These features apply to core program funding.

## **Delegation Order Process**

- The Panel has delegated authority to the Executive Director, without consultation with the Panel Chair, to approve (1) small business (100 or fewer employees) for \$75,000 or less, and (2) single and multiple employer proposals for \$75,000 or less.
- This procedure allows projects to be approved on a flow basis. This process recognizes the need for just-in-time training, and reduces or eliminates the need for a Consent Calendar.
- An ETP130 and Curriculum is prepared for each proposal. They are reviewed and approved after the Executive Director signs off. The effective date will be the date specified by the Field Analyst and if no date is specified, the earliest effective date of contract is the day after the project is approved by the Executive Director.
- A copy of approved Delegation Orders is included in each month's Panel Packet, for projects approved prior to the Panel meeting, as an informational item.



# MEMORANDUM

To:	Panel Members	Date:	As of 11/05/2021
CC:	Reg Javier, Executive Director Peter Cooper, Assistant Director		
From:	Meghan McMahon, Legal Analyst		
Subiect:	Pertinent Legislation: California Legislature: 2021-2022 Regula	ar Sess	ion

## Table of Contents:

	Assembly Bills	
	Senate Bills	
III.	Budget Bills	4
IV.	Cannabis-Related Bills/Initiatives/Propositions	7

## I. ASSEMBLY BILLS

• AB-105 The Upward Mobility Act of 2021: civil service: examinations: classifications.

Summary: This bill presents a series of changes to civil service personnel requirements.

<u>Status</u>: On 10/08/2021: Vetoed by Governor. "This bill would modify several processes related to civil service job announcements, examinations, classifications, and hiring practices. Additionally, it would require certain boards and commissions to include appointed representatives of underrepresented groups and institute new data collection requirements... While the goals of AB 105 are laudable, elements of the bill conflict with existing constitutional requirements, labor agreements, and current data collection efforts. Therefore, it may have unintended consequences that warrant further consideration. Furthermore, as AB 105 would cost tens of millions of dollars, these one-time and significant ongoing costs should be considered through the annual state budget process."

## AB-218 Change of gender and sex identifier.

<u>Summary</u>: This bill would make substantive changes to specify how to change gender and sex identifier in particular records such as birth certificates.

Status: On 10/06/2021: Approved by the Governor, Chaptered by the Secretary of State.

Pertinent Legislation; California Legislature 2021-2022 Regular Session As of 11/05/2021 Page 2 of 8

• AB-237 Public employment: unfair practices: health protection.

<u>Summary</u>: This bill, the Public Employee Health Protection Act, would among other things make it an unfair practice for a covered employer to fail or refuse to maintain or pay for continued health care or other medical coverage for an enrolled employee or their enrolled dependents, for the duration of the enrolled employee's participation in the authorized strike, at the level and under the conditions that coverage would have been provided if the employee had continued to work in their position for the duration of the strike.

Status: On 10/09/2021: Approved by the Governor, Chaptered by the Secretary of State.

## • AB-473 California Public Records Act.

<u>Summary</u>: This bill would recodify and reorganize the provisions of the act. The bill would include provisions to govern the effect of recodification and state that the bill is intended to be entirely nonsubstantive in effect. The bill would contain related legislative findings and declarations. The bill would become operative on January 1, 2023. 2

Status: On 10/07/2021: Approved by the Governor, Chaptered by the Secretary of State.

## • AB-474 California Public Records Act: confirming revisions.

<u>Summary</u>: This bill would enact various conforming and technical changes related to another bill that recodifies and reorganizes the California Public Records Act. The bill would only become operative if the related bill recodifying the act is enacted and becomes operative on January 1, 2023. The bill would also specify that any other bill enacted by the Legislature during the 2021 calendar year that takes effect on or before Pertinent Legislation; California Legislature 2021-2022 Regular Session As of 09/29/2021 Page 3 of 10 January 1, 2022, and that affects a provision of this bill shall prevail over this act, except as specified.

Status: On 10/07/2021: Approved by the Governor, Chaptered by the Secretary of State.

## • CHAPTER 323 (AB-628): Breaking Barriers to Employment Initiative.

<u>Summary</u>: Among other things, this bill would instead provide that the initiative in intended to focus on innovative approaches to, and proven practices for, addressing racial, ethnic, and socioeconomic disparities in the labor market. The bill would require the executive director of the board to convene an advisory group, as prescribed, to make recommendations to the board on grant application criteria and parameters for eligible organizations, review and make recommendations to the board regarding grant proposals, support identification of prospective grantees, support technical assistance opportunities, and make recommendations to the board to strengthen implementation. The bill would require the board to consider the recommendations of the advisory group.

Status: On 09/27/2021: Approved by Governor, Chaptered by the Secretary of State.

• AB-680 Greenhouse Gas Reduction Fund: California Jobs Plan Act of 2021.

<u>Summary</u>: This bill would enact the California Jobs Plan Act of 2021, which would require the Labor and Workforce Development Agency to work with the state board to update, by July 1, 2023, the funding guidelines for administering agencies to ensure that all applicants to grant programs funded by the Greenhouse Gas Reduction Fund meet specified standards, including fair and responsible employer standards and inclusive procurement policies, as defined. The bill would require administering agencies to give preference to applicants that demonstrate a partnership with an educational institution or training program targeting residents of disadvantaged, tribal, and low-income communities.

Status: On 10/09/2021: Approved by the Governor, Chaptered by the Secretary of State.

• <u>AB-1273 Interagency Advisory Committee on Apprenticeship: the Director of</u> <u>Consumer Affairs and State Public Health Officer.</u>

<u>Summary</u>: This bill would additionally make the State Public Health Officer and the Director of Consumer Affairs ex officio members of the Interagency Advisory Committee on Apprenticeship. This bill would prohibit the Department of Consumer Affairs and its various boards from prohibiting or approving an accrediting program that prohibits earn and learn programs for training in a profession licensed or certified by the board. The bill would prohibit the State Department of Public Health from prohibiting earn and learn programs for training of personnel. The bill would require boards of the Department of Consumer Affairs and the State Department of Public Health to use licensing or certification standards that authorize the use of earn and learn trainings.

Status: On 10/04/2021: Approved by the Governor, Chaptered by the Secretary of State.

## II. SENATE BILLS

# • <u>SB-805 Small nonprofit performing arts organizations: payroll and paymaster</u> <u>services grants: employment grants.</u>

<u>Summary</u>: This bill would, upon appropriation by the Legislature, require the council to establish and administer the California Nonprofit Performing Arts Paymaster. The bill would require the council to issue a request for proposals and award contracts on a competitive basis to 2 or more nonprofit contractors to provide payroll and paymaster services to small nonprofit performing arts organizations, as defined. The bill would require the council to establish a criteria to rate and rank applicants and establish necessary contract terms. The bill would, upon appropriation, require the council to provide a nonprofit contractor selected to provide payroll services with a grant award in an amount necessary to fund the initial startup costs. This bill would authorize a nonprofit contractor providing services to charge a fee to a nonprofit performing arts organization that receives payroll or paymaster services, provided that the fee does not exceed the cost of providing the services. The bill would require a nonprofit contractor that provides services under these provisions to submit an annual report to the council

by July 31 of each year that provides specified information from the prior fiscal year, including, among other things, a detailed accounting of all fees charged and collected. This bill would establish the Performing Arts Equitable Payroll Fund, and would require the council, upon appropriation by the Legislature, to establish and administer a grant program using moneys in the fund to award grants for the purpose of enabling small nonprofit performing arts organizations to hire and pay employees at least minimum wage. The bill would require the council to award the grants in amounts according to a specified matching schedule based on the adjusted gross revenue, as defined, of the organization.

<u>Status</u>: On 10/05/2021: Vetoed by the Governor. In Senate, Consideration of Governor's veto pending. "This bill is duplicative of existing efforts and puts additional requirements on the Council to administer the program that may result in General Fund costs not contemplated in the Budget Act."

## III. BUDGET BILLS

## • <u>CHAPTER 17 (AB-80): Taxation: Coronavirus Aid, Relief, and Economic Security</u> <u>Act: Federal Consolidation Appropriations Act, 2021.</u>

<u>Summary</u>: The Personal Income Tax Law and the Corporation Tax Law, in conformity with federal income tax law, generally define "gross income" as income from whatever source derived, except as specifically excluded, and provide various exclusions from gross income. Existing law, in conformity with the federal Coronavirus Aid, Relief, and Economic Security Act (CARES Act), and its subsequent amendments in the Paycheck Protection Program and Health Care Enhancement Act and the Paycheck Protection Program Flexibility Act of 2020, among other things, excludes any amounts of covered loans forgiven under the CARES Act from gross income for purposes of the Personal Income Tax Law and the Corporation Tax Law. Existing law reduces the amount of any credit or deduction otherwise allowed under the Personal Income Tax and the Corporation Tax Law for any amount paid or incurred by the taxpayer upon which this exclusion is based by the amount of the exclusion allowed. Existing law requires any bill authorizing a new tax expenditure to contain, among other things, specific goals, purposes, and objectives the tax expenditure will achieve, detailed performance indicators, and data collection requirements.

Existing federal law, the Consolidated Appropriations Act, 2021, prohibits reductions in tax deductions, denials of basis adjustments, and reductions in tax attributes for federal income tax purposes based on the exclusion from gross income provided in the federal CARES Act and its subsequent amendments. This bill would exclude, for taxable years beginning on or after January 1, 2019, from gross income any advance grant amount, as defined, issued pursuant to specified provisions of the CARES Act or the Consolidated Appropriations Act, 2021, and covered loan amounts forgiven pursuant to the Consolidated Appropriations Act, 2021. This bill would adopt, except as provided, the provisions of the Consolidated Appropriations Act, 2021, prohibiting any reduction in tax

deductions, denials of basis adjustments, and reductions in tax attributes based on the exclusion from gross income provided for any loan amount forgiven in modified conformity with the federal CARES Act and its subsequent amendments. This bill would provide findings to comply with the additional information requirement for any bill authorizing a new tax expenditure. This bill would also make findings and declarations related to a gift of public funds. This bill would declare that it is to take effect immediately as an urgency statute.

Status: On 04/29/2021: Approved by the Governor and filed with the Secretary of State.

• CHAPTER 12 (AB-88): One-time stimulus and grant payments: garnishment: exclusion from gross income.

<u>Summary</u>: This bill would, except as provided, make both payments automatically exempt from a garnishment order, as defined, and would require a financial institution to employ a certain procedure to identify a deposit exempt pursuant to that provision. The bill would prohibit a financial institution that attempts to comply with those provisions in good faith from being subject to liability, as specified. The bill would also further clarify the definition of "qualified recipient" for purposes of the Golden State Stimulus payment and a "grant recipient" eligible to receive a Golden State Grant payment. The bill would appropriate \$100,000 from the General Fund to augment Schedule (1) of Item 7730-001-0001 of the 2020 Budget Act for the Franchise Tax Board to be allocated to existing California Earned Income Tax Credit outreach contracts to provide increased awareness of the Golden State Stimulus and would exempt, for the purpose of providing timely distribution of funds for Golden State Stimulus awareness, the Franchise Tax Board and its administrative partner, the Department of Community Services and Development, from all provisions of state contracting law governing the amendment of contracts.

Status: On 03/17/2021: Approved by the Governor and filed with the Secretary of State.

• <u>CHAPTER 7 (SB-87): California Small Business Covid-19 Relief Grant Program:</u> income tax: gross income: exclusion: small business grants.

<u>Summary</u>: Among other things, this bill would establish the California Small Business COVID-19 Relief Grant Program within CalOSBA to assist qualified small businesses affected by COVID-19 through administration of grants. The bill would require CalOSBA to provide grants to qualified small businesses, as defined, in accordance with specified criteria, including geographic distribution based on COVID-19 restrictions, industry sectors most impacted by the pandemic, and underserved small businesses. The bill would appropriate \$2,075,000,000 from the General Fund to the Golden State Stimulus Emergency Fund to be transferred to the Office of Small Business Advocate for purposes of the program, and would allocate \$50,000,000 of those funds for eligible nonprofit cultural institutions, as defined.

Status: On 02/23/2021: Approved by the Governor and filed with the Secretary of State.

• <u>CHAPTER 8 (SB-88): One-time stimulus payment: delinquent accounts: Earned</u> <u>Income Tax Credit: statements.</u>

<u>Summary</u>: Among other things, this bill would authorize the Controller to make a one-time Golden State Stimulus payment to each qualified recipient, as defined, of an applicable amount, as specified, in a form and manner determined by the Franchise Tax Board, in order to provide relief to low-income Californians impacted by the COVID-19 emergency. This bill would create the Golden State Stimulus Emergency Fund, a new fund in the State Treasury, for the purposes of making these one-time payments, and would continuously appropriate that fund. This bill would also authorize one-time grant payments to qualified grant recipients, as defined, of \$600, to be administered by the State Department of Social Services, in order to provide relief to low-income Californians impacted by the COVID-19 emergency.

Status: On 02/23/2021: Approved by the Governor and filed with the Secretary of State.

## • CHAPTER 1 (SB-89): Budget Act of 2020.

<u>Summary</u>: The Budget Act of 2020 made appropriations for the support of state government for the 2020–21 fiscal year. This bill would amend the Budget Act of 2020 by adding items of appropriation and making other changes. This bill would declare that it is to take effect immediately as a Budget Bill.

Status: On 01/28/2021: Approved by the Governor and filed with the Secretary of State.

## • CHAPTER 2 (SB-91): COVID-19 relief: tenancy: federal rental assistance.

<u>Summary</u>: Among other things, this bill would prohibit a housing provider, tenant screening company, or other entity that evaluates tenants on behalf of a housing provider from using an alleged COVID-19 rental debt, as defined, as a negative factor for the purpose of evaluating a prospective housing application or as the basis for refusing to rent a dwelling unit to an otherwise qualified prospective tenant. This bill, until July 1, 2021, would prohibit a person from selling or assigning unpaid COVID-19 rental debt, as defined, for the time period between March 1, 2020, and June 30, 2021. The bill would also prohibit a person from selling or assigning unpaid COVID-19 rental debt, as defined, for that same time period of any person who would have qualified for rental assistance funding, provided pursuant to specified federal law, where the person's household income is at or below 80% of the area median income for the 2020 calendar year.

Status: On 01/28/2021: Approved by the Governor and filed with the Secretary of State.

## • CHAPTER 13 (SB-95): Employment: COVID-19: supplemental paid sick leave.

<u>Summary</u>: This bill would appropriate \$100,000 from the General Fund to the Labor Commissioner for staffing resources to implement and enforce these provisions. This bill would, among other things, provide for COVID-19 supplemental paid sick leave for covered employees, as defined, who are unable to work or telework due to certain reasons related to COVID-19, including that the employee has been advised by a health care provider to self-quarantine due to concerns related to COVID-19. The bill would

entitle a covered employee to 80 hours of COVID-19 supplemental paid sick leave if that employee either works full time or was scheduled to work, on average, at least 40 hours per week for the employer in the 2 weeks preceding the date the covered employee took COVID-19 supplemental paid sick leave. The bill would provide a different calculation for supplemental paid sick leave for a covered employee who is a firefighter subject to certain work schedule requirements and for a covered employee working fewer or variable hours, as specified. The bill would provide that the total number of hours of COVID-19 supplemental paid sick leave to which a covered employee is entitled to under these provisions is in addition to any paid sick leave available under the act, as specified.

Status: On 03/19/2021: Approved by the Governor and filed with the Secretary of State.

## IV. CANNABIS RELATED BILLS/INITIATIVES/PROPOSITIONS

## • CHAPTER 264 (AB-287): Civil actions: statute of limitations.

<u>Summary</u>: MAUCRSA imposes a civil penalty on a person engaging in commercial cannabis activity without a license required by MAUCRSA of up to 3 times the amount of the license fee for each violation. MAUCRSA does not supersede or limit state agencies from exercising their existing enforcement authority. MAUCRSA authorizes a local jurisdiction to enforce its provisions and the regulations promulgated by a licensing authority if delegated the power to do so by the licensing authority, as specified. Existing law generally requires an action upon a statute for a penalty or forfeiture to commence within one year. This bill would require a civil action for a penalty described above to commence within 3 years

Status: On 09/23/2021: Approved by the Governor, filed with the Secretary of State.

## • AB-527 Controlled substances.

<u>Summary</u>: This bill would exempt from Schedule III specific compounds, mixtures, or preparations that contain a nonnarcotic controlled substance in combination with a derivative of barbituric acid or any salt thereof that are listed in the federal Table of Exempted Prescription Products and have been exempted pursuant to federal law or regulation. The bill would exempt from Schedule IV specific compounds, mixtures, or preparations that contain a nonnarcotic controlled substance in combination with a chlordiazepoxide or phenobarbital that are listed in the federal Table of Exempted Prescription Products and have been exempted pursuant to regulation.

Status: On 10/07/2021: Approved by the Governor, Chaptered by the Secretary of State.

## • AB-1138 Unlawful cannabis activity: civil enforcement.

<u>Summary</u>: MAUCRSA imposes a civil penalty on a person engaging in commercial cannabis activity without a license as required by the act, of up to 3 times the amount of the license fee for each violation. This bill would impose a civil penalty on persons aiding

and abetting unlicensed commercial cannabis activity of up to \$30,000 for each violation. The bill would prohibit filing an action for civil penalties brought against a person pursuant to MAUCRSA 3 years after the first date of discovery of the violation by a licensing authority or a participating agency, whichever is earlier or earliest.

Status: On 10/05/2021: Approved by the Governor, Chaptered by the Secretary of State.

## • SB-292 Industrial hemp.

<u>Summary</u>: This bill would instead require the sampling to occur within a timeframe determined by the department. The bill would require a registrant to destroy or dispose of the industrial hemp grown upon receipt of a laboratory test result described above. The bill would require that laboratory test reports of hemp include the measurement of uncertainty, as defined, associated with the test results. The bill would also require laboratories to use appropriate, validated methods and procedures for all testing activities, including when estimating the measurement of uncertainty. By adding new requirements for hemp testing, the violation of which could be a crime, this bill would impose a state-mandated local program.

Status: On 10/04/2021: Approved by the Governor, Chaptered by the Secretary of State.

• SB-311 Compassionate Access to Medical Cannabis Act or Ryan's Law.

<u>Summary</u>: This bill, the Compassionate Access to Medical Cannabis Act or Ryan's Law, would prohibit specified types of health care facilities from prohibiting or interfering with a terminally ill patient's use of medicinal cannabis within the health care facility, subject to certain restrictions.

<u>Status</u>: On 09/28/2021: Approved by the Governor, Chaptered by the Secretary of State.

## • SB-544 Cannabis testing.

<u>Summary</u>: This bill would implement the above provisions of AUMA by requiring the bureau, on or before January 1, 2023, to establish specific testing standards for the compounds and contaminants that are required to be reported on the certificate of analysis.

<u>Status</u>: On 10/05/2021: Approved by the Governor, Chaptered by the Secretary of State.



**EXPANSION FUNDS** 

## **Training Proposal for:**

## A. Preman Roofing, Inc.

## Contract Number: ET22-0160

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: J. Lima

## PROJECT PROFILE

Contract Attributes:	Expansion Fund Priority Rate Retrainee			Construc	tion (C)	
				Priority Ir	ndustry: 🛛Yes 🔲No	
Counties Served:	San Diego		Repeat Contractor:	🗌 Yes 🛛 No		
Union(s):	🗌 Yes 🛛 No					
Number of Employees in:		CA: 185	U.S.:185		Worldwide: 185	
<u>Turnover Rate</u> : 10		10%				
Managers/Supervisors: (% of total trainees)		11%				

## **FUNDING DETAIL**

In-Kind Contrik	oution
\$219,000	

Total ETP Funding
\$199,479

## TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Rang Hou		Average Cost per Trainee	
No.	Job Description	Type of Training	Trainees	Class / Lab	СВТ		
1	Retrainee	Continuous Impr,	177	8-200	0	\$1,127	\$23.58
	Priority Rate	Computer Skills Business Skills Commericial Skills PL-Commericial Skills		Weighte 49	•		

\*Post-Retention Wage is the Contractual Wage.

<b>Minimum Wage by County:</b> \$19.12 per hour for San Diego County. <b>Health Benefits:</b> Yes X 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	Actual Wage Range	Estimated # of Trainees				
Customer Service Staff		15				
		10				
Design Stoff		10				
Design Staff	Actual Wage Range	5				
Drivers		10				
Managara/Supan/jaara/Suparintandanta		3				
Managers/Supervisors/Superintendents		2				
Project Managara		10				
Project Managers		5				
Roofing Staff		62				
Salaa/Markating Staff		5				
Sales/Marketing Staff		5				
Solar Staff		35				

## **INTRODUCTION**

A. Preman Roofing, Inc. (APR, Inc.) (<u>www.premanroofing.com</u>) was founded in 1999 and headquartered in San Diego. APR, Inc. offers a variety of cost-effective roofing and solar options for commercial and residential properties. In the residential roofing sector, the Company offers new roof installations as well as roof maintenance and warranties. APR, Inc. is now offering Solar Roofing installation on both residential and commercial buildings. APR, Inc.'s solar power services maximize energy efficiency and decrease business and home electric bills. The Company specializes in customized solar panel designs for any size property and serves both owners of residential and commercial buildings in San Diego and surrounding areas.

APR, Inc. has an affiliate company, Pro-Prept, Inc., that will participate in this project and is located within the same headquarter location. Both companies have the same owner.

## Veterans Program

The company encourages and actively recruits veterans, but will not separate them out in this contract. Veterans learn of job opportunities from Veteran job boards and other public job notices.

## PROJECT DETAILS

This is APR, Inc.'s first ETP Contract. The proposed training will help the Company grow its business and improve product quality. ETP funding will also allow the Company to expand its training efforts into new areas to help its trainees gain higher skill levels.

#### Training Plan

**Business Skills**: Trainees under the occupation of Customer Service Staff, Design Staff, Drivers, Managers/Supervisors/Superintendents, Project Managers, Roofing Staff, Sales/Marketing Staff and Solar Staff will train in Business Skills.

**Commercial Skills**: Trainees under the occupation of Design Staff, Drivers, Project Managers, Roofing Staff, and Solar Staff will train in Commercial Skills.

**Computer Skills**: Trainees under the occupation of Customer Service Staff, Design Staff, Drivers, Managers/Supervisors/Superintendents, Project Managers, Roofing Staff, Sales/Marketing Staff and Solar Staff will train in Computer Skills.

**Continuous Improvement**: Trainees under the occupation of Customer Service Staff, Design Staff, Drivers, Managers/Supervisors/Superintendents, Project Managers, Roofing Staff, Sales/Marketing Staff and Solar Staff will train in Continuous Improvement.

#### **Productive Laboratory**

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

Sixty trainees under the occupation of Drivers, Roofing Staff, and Solar Staff will receive Productive Lab in Commercial Skills. Productive Lab training is necessary as trainees must learn how to operate proprietary equipment that requires hands-on experience. The trainer to trainee ratio will be 1:3 or less. There may be cases when instructors are not available to provide 1:1 training and the need for a 1:3 ratio is requested in order to allow the Company to complete projects on time while workers are being trained.

#### Commitment to Training

Currently, APR, Inc. spends \$205,000 in training annually that includes new-hire orientation, firstaid training, and an on-the-job training program for commercial skills. MS Office (Basic level) is provided on an as-needed basis.

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 begin upon Panel approval. APR, Inc. has designated a team of 5 staff that includes an Operations/Safety Manager, a Training Coordinator, and Managers/Supervisors to oversee ETP training and administrative responsibilities. Managers/Supervisors will provide training, secure rosters, and ensure ETP compliance. The Company has also retained a third party subcontractor to assist with administrative duties.

#### Impact/Outcome

APR, Inc. is working to improve production and installation processes. Removing waste in the production process makes better use of company resources and helps the Company grow. Sustained growth creates a more stable workforce and creates jobs in California. The Company will hire more employees to meet increased demand. As it expands the Company projects to hire an additional 30 employees.

## **DEVELOPMENT SERVICES**

The Company retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of \$10,000.

## ADMINISTRATIVE SERVICES

The Company also retained National Training Company 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**

- Building Teams
- Hazard Analysis
- Job Site Quality Control
- Solving Installation Problems

## **COMPUTER SKILLS**

- Document Control
- Electronic Bids
- Internal Software Applications
- MS Office (Intermediate/Advanced)
- Project Management Software

## **BUSINESS SKILLS**

- Bids and Project Quotes
- Commercial Estimates
- Customer Specifications
- Energy Computations
- Handling Difficult People
- Inventory Management
- Product Specifications
- Project Management
- Roofing Warranties
- Scheduling
- Solar Consultations
- Solar System Warranties

## **COMMERCIAL SKILLS**

- Acrylic Roofing
- Commercial Roofing Materials
- Construction Processes
- Cool Roofing
- Electric Company Standards
- Equipment Operation
- Forklift Operation
- Infrastructure Inspection Procedures
- Job Performance
- Job Site Preparation
- Maintenance Equipment
- Material Data Sheets
- Material Quality
- Metal Roofing
- Mobile Carts
- Reducing Construction Errors
- Replacement Installation

- Residential Roofing Materials
- Roofing Installation Procedures
- Solar System Installation Procedures
- Solar Systems
- Special Construction Tools
- Standard Operating Procedures
- Structural Fabrication
- Thermal Plastic Roofing

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

## Productive Lab Hours

0-60

## **<u>COMMERCIAL SKILLS</u>** (1:3 trainer-to-trainee ratio)

- Equipment Operation Procedures
- Quality Control Procedures
- Roofing Installation Procedures
- Solar System Installation Procedures
- Standard Operating Procedures

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



**EXPANSION FUNDS** 

## **Retrainee-Job Creation**

## **Training Proposal for:**

## Agilent Technologies, Inc.

## Contract Number: ET22-0157

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: S. Wang

## PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate Expansion Funds (Alt/Gen)		Industry Sector(s):	Manufact Biotechn	turing (E) ology and Life Sciences (54+)
				Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	Sacramento, Sa Santa Barbara	anta Clara,	Repeat Contractor:	🛛 Yes 🗌 No	
Union(s):	🗌 Yes 🛛 No				
Number of Employees in:		CA: 2,750	U.S.: 14,800		Worldwide: 14,800
Turnover Rate:		8%			
Managers/Supervisors: (% of total trainees)		8%			

## **FUNDING DETAIL**

In-Kind Contribution

\$960,000

Total ETP Funding
\$499,100

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Rang Hou Class / Lab		Average Cost per Trainee	
1	Retrainee Priority Rate	Computer Skills, Continuous Impr, Mfg. Skills	295	8–200 Weighte 60	-	\$1,380	\$25.86
2	Retrainee Job Creation Priority Industry	Computer Skills, Continuous Impr, Mfg. Skills	50	8-200 Weighte 80	-	\$1,840	\$25.39

#### \*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1: Santa Clara County - \$20.86 per hour; Sacramento and Santa Barbara Counties - \$17.70 per hour. Job Number 2: Santa Clara County - \$17.39 per hour; Sacramento and Santa Barbara Counties - \$15.65 per hour. Health Benefits: ∑ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

**Used to meet the Post-Retention Wage?:** Yes No Maybe Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation							
Occupation Titles	Actual Wage Range	Estimated # of Trainees					
Job Number 1: Retrainee							
Administrators		70					
Engineers		150					
Managers / Supervisors		25					
Technicians		50					
Job Number 2: Job Creation							
Administrators		10					
Engineers		25					
Managers / Supervisors		5					
Technicians		10					

## **INTRODUCTION**

Founded in 1999 and headquartered in Santa Clara, Agilent Technologies, Inc. (Agilent) (<u>www.agilent.com</u>) develops and manufactures products that sense, analyze, display, and communicate data for use in the life sciences, diagnostics, and chemical-analysis industries. These products include Oscilloscopes, Chromatographs, Spectrometers, Atomic Force Microscopes, Microarrays, Companion Diagnostics, Flow Cytometry, and Cell Analysis Instruments. Agilent's equipment enables customers to analyze particles at the molecular level. ETP-funded training will be delivered at the Company's headquarters in Santa Clara where the majority of its research is conducted and at its two manufacturing sites in Folsom and Carpinteria.

Agilent sells to customers in 110 countries with a large portion of its sales generated outside California. Its customer base includes therapeutics and human disease researchers, highly complex clinical testing labs, and emerging life sciences research institutes.

## Veterans Program

Even though Agilent does not plan to include a separate Veteran's Job Number, the Company has established Affirmative Action Programs under the Vietnam Era Veteran's Readjustment Assistance Act of 1974 ("VEVRAA"). VEVRAA requires affirmative action to recruit, employ, and advance in employment, disabled veterans, recently separated veterans (i.e. - within three years of discharge or release from active duty), active duty wartime or campaign badge veterans, or Armed Forces' service-medal veterans. Agilent is committed to serving these individuals.

## PROJECT DETAILS

This will be Agilent's eighth ETP Contract, its third in the last five years. In its previous ETP Contract, the major focus of training was on continuous improvement initiatives to promote greater collaboration across the Company and to address the COVID-19 pandemic. In this proposal, Agilent will continue to train staff on product technologies and other operational procedures in order to further address the changes in the healthcare industry. Agilent has agreed to not enroll any employees who have been previously placed in an ETP Contract. The Company also confirmed that all proposed courses are new.

Focus for this proposal is on product technology training for frontline technical and management staff involved in research, production, quality control, and technology advancements. The development, design, and manufacture of all Agilent products is very complex and requires a high degree of technical knowledge by employees. Training is intended to foster a high level of innovation and product development, knowledge of critical IT systems, and high-level communication, professionalism, and ethics across the organization. All proposed training will provide trainees skillsets that are transferable throughout the life-science industry.

## **Retrainee - Job Creation**

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

Due to business-capacity growth in new research and development, Agilent has aggressive hiring plans for field-service technician and engineer occupations. Job duties are to provide technical assistance, maintenance, and business development for its life sciences, diagnostics, and applied chemical customers. In this proposal, the Company will hire 50 new employees (Job Number 2). The hiring is a reflection of Agilent's growth and increased orders with over 150 job openings posted on its website. Depending on market conditions in 2022 and beyond, Agilent's hiring projections will likely exceed the 50 (job-creation goal) by the ETP Contract's term-end date. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

## Training Plan

ETP-funded training will be offered to all occupations via Class/Lab/E-Learning and Computer-Based Training (CBT) in the following:

**Computer Skills**: Course topics include Advanced Manufacturing Control Systems, Business System Processing, Desktop Productivity Applications, and eBusiness Applications. Training will increase employee skills and introduce staff to upgrades with internal computer software programs and systems.

**Continuous Improvement**: Course topics include Advanced Negotiation, Building Constructive Communications, Design for Excellence, and Design Tools and Practices. Trainees will gain skills to implement significant improvements in productivity enhancements, decision making, corrective action, and prevention.

**Manufacturing Skills**: Course topics include Atomic Absorption, Atomic and Molecular Spectroscopy, Biochemical Analyzers, and Chemical Synthesizer Instruments. Training will assist staff in ways to ask the right questions, how to collect the right data, and what to look for in data and outputs.

## Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0–60 hours of CBT.

## Commitment to Training

Agilent's statewide training expenditures in California for non-ETP related training is in excess of \$1,500,000. The ETP curriculum will build on (but not overlap) training already provided by the Company. Agilent funds all orientation and basic-job skills' training, OSHA and FDA-mandated safety regulations' training, basic desktop training, and executive development training programs. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

## Training Infrastructure

The Company's Director of Global Talent (dedicated administrator) will be the signatory of the Contract and has overall responsibility for the ETP project. The Manager of Global Talent Development will assist with ETP administration. Agilent will utilize its internal-training department for scheduling, delivering, and utilizing the LMS to document ETP training. In addition, it hired an experienced third-party subcontractor to assist with ETP administration.

## Electronic Recordkeeping/LMS

Staff has reviewed and approved the Company's Learning Management System (LMS).

#### Impact/Outcome

Employees who successfully complete any information-technology course will receive equipment/technology skills' certifications that are transferable within the industry. ETP-funded training has been customized to enhance the skills of front-line workers ranging from field engineers to headquarter-support occupations to give these trainees skills to remain employed at Agilent or transferable skills to be employed by other life-science employers in California.

## ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0162	\$200,000	10/5/2020 – 10/4/2022	100	100	100

Based on ETP systems, 590 reimbursable hours have been tracked for potential earnings of \$200,000 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through July 2021.

## PRIOR PROJECTS

The following table summarizes Contractor's performance under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET20-0123	Sacramento, Santa Barbara, Santa Clara	9/3/2019 – 9/2/2021	\$749,892	\$749,892 (100%)
18CS-0040	Sacramento, Santa Barbara, Santa Clara	8/3/2017 – 8/2/2019	\$593,848	\$593,848 (100%)

## DEVELOPMENT SERVICES

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

## ADMINISTRATIVE SERVICES

The Company also retained Herrera & Company to perform administrative services in connection with this proposal for an amount not to exceed 13% of payment earned.

## TRAINING VENDORS

To Be Determined

## Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8–200

Trainees may receive any of the following:

#### COMPUTER SKILLS

- Advanced Manufacturing Control Systems
- Business System Processing
- Desktop Productivity Applications
- eBusiness Applications
- Management and Manufacturing Control Systems
- Materials and Logistics Software Development
- Project Management Software Tools
- Programming Languages

## **CONTINUOUS IMPROVEMENT**

- Advanced Negotiation
- Building Constructive Communications
- Communicating for Results
- Design for Excellence
- Design Tools and Practices
- Efficiency Workflow
- Facilitation Skills and Mentorship
- Individual Transition in Organizations
- Innovation and Influence
- Leadership Essentials
- Leading Cross-Functional Teams
- Managing for Performance
- Product Quality and Reliability
- Quality Fundamentals / Core Skills

## MANUFACTURING SKILLS

- Atomic Absorption
- Atomic and Molecular Spectroscopy
- Biochemical Analyzers
- Chemical Synthesizer Instruments
- Gas Chromatography
- Liquid Chromatography
- Mass Spectrometers
- Microarray Imaging Microscopes
- Microplate Instrumentation
- Oxygen Measurement Instruments
- Particle Analysis and Characterization Systems
- Pharmaceutical Tablet Testing Equipment

## CBT Hours

0–60

## **COMPUTER SKILLS**

- Advanced Project Management Software (6 hrs.)
- Computer Assisted Design (8 hrs.)

- Database Design (4 hrs.)
- Electronic Record Management (1.5 hrs.)
- Manufacturing Resources Planning (5.5 hrs.)

#### **CONTINUOUS IMPROVEMENT**

- Advanced Customer Communications and Awareness (0.5 hr.)
- Leadership / Coaching Skills (1 hr.)
- Marketing Promotion and Strategy (12 hrs.)
- Multi-Cultural Customer Service Relationships (2 hrs.)
- Problem Solving Tools and Techniques (3.5 hrs.)
- Process Improvement Training (16 hrs.)

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.



## **EXPANSION FUNDS**

## **Training Proposal for:**

## Alameda County Workforce Development Board

## Contract Number: ET22-0178

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: S. Wang

## PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Priority Rate Retrainee	Industry Sector(s):	Services (G) Biotechnology and Life Sciences (54+) Priority Industry: X Yes No	
Counties		Repeat		
Served:	Alameda and San Mateo	Contractor:	🗌 Yes 🛛 No	
Union(s):	🗌 Yes 🛛 No			
Turnover Rate:		≤20%		
Managers/Supervisors: (% of total trainees)		≤0%		

## FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$186,300		\$12,960 8%		\$199,260
In-Kind Contribution:	50% of <sup>-</sup>	Total ETP Funding Required	I	\$202,500

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Priority Rate	Business Skills, Comm. Skills, Cont. Improv., Mfg. Skills, PL-Mfg. Skills	135	8–200 Weighter 60	-	\$1,476	\$20.86

#### \*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Alameda and San Mateo counties - \$20.86 per hour.
Health Benefits: Xes No This is employer share of cost for healthcare premiums –
medical, dental, vision.
Used to meet the Post-Retention Wage?: 🛛 Yes 🗌 No 🗌 Maybe
Lin to \$0.26 per hour may be used to meet the Dest Potentian Wage

Up to \$0.36 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of				
	· · · · · · · · · · · · · · · · · · ·	Trainees				
Field Service Engineers		1				
Laboratory Technicians		1				
		1				
Order Fulfillment Staff		1				
Production Worker		100				
Technical Staff / Scientist		31				

## INTRODUCTION

Founded in 1998 and headquartered in Hayward, the Alameda County Workforce Development Board (ACWDB) (<u>www.acwdb.org</u>) is a workforce development service agency. ACWDB is a 27member industry-led board comprised of representations from business, civic, education, labor, community, and economic sectors. The Board is federally mandated under the Workforce Innovation and Opportunity Act (WIOA) to implement a public workforce system for Alameda County. ACWDB administers education, training, and employment services through contracted service providers to help youth/young adults, adults, dislocated workers, and businesses. ACWDB's customers include: business employers, job seekers, youth, and young adults. This will be ACWDB's first ETP Contract. In this proposal, ACWDB will be providing administrative assistance to the participating employers (PE) working in the biomedical industry. ETP training will be delivered at each of the PE's facilities located in Alameda and San Mateo counties.

#### Veterans Program

Even though a Veteran's Job Number will not be added to this proposal, ACWDB recruits veterans through its advertisements and mailing lists and partners with organizations serving veterans such as Swords to Ploughshares.

## PROJECT DETAILS

Training in this proposal will focus on upskilling staff to perform tasks in new biomedical manufacturing areas in alignment with Current Good Manufacturing Practices (CGMP) training requirements and FDA Regulations. CGMP knowledge is a requisite for bio-manufacturing jobs, especially for innovative therapies. As companies continue to expand in biomedical development, employees with the requisite knowledge will be highly sought after. Training will ensure that employees are following CGMP principles, quality systems, and cleanroom practices so that they will be qualified on the job.

Additionally, one of the participating employers will be expanding into its Cell Therapy biomanufacturing facility by 2022. Training in CGMP knowledge will allow employees to qualify for work at this facility.

#### Training Plan

Training will be delivered to all occupations using Class/Lab and E-Learning delivery methods in the following:

**Business Skills**: Course topics include Communication Skills, Order Fulfillment, and Interpersonal Skills to ensure that staff know standard-business procedures.

**Commercial Skills:** Course topics include Indirect Material Storage and Inventory Adjustment in SAP to ensure knowledge in proper handling of business materials and inventory.

**Continuous Improvement**: Course topics include Advanced Product Quality and Productivity, CGMP Principles, Clean Room Procedures, Problem Solving Tools and Techniques. This will ensure staff have the proper knowledge to meet the requisites to work in the facility.

**Manufacturing Skills**: Course topics include Aseptic Processing, Biosafety & Exposure Control Plan, Equipment Maintenance Training, and Ladder Safety to ensure safety while using equipment.

#### Productive Laboratory

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

ACWDB has identified approximately 35 trainees to receive PL- Manufacturing Skills training in course topics such as Equipment Operations and Maintenance, Cell Culture, Blood Processing and Flow Cytometry, and Product Procedures for all occupations.

ACWDB requests to deliver approximately 60 hours of PL training per trainee. Training will include approximately five types of equipment in which trainees of different PEs will learn its stepby-step procedures for operation while on the production floor. The equipment includes a Cell Metric Cell Line Development Instrument, REES Monitoring System, Blue Mountain Regulatory Asset Management, Sparta System/Track Wise Digital, and OSI EHS. The training will support qualifications to perform work while learning new processes and operation of new instruments. Additionally, training will help trainees to understand quality and compliance requirements to ensure alignment with FDA Regulations and safety requirement to ensure safety of personnel and products. Trainers of PL training will be subject-matter experts (SME) ranging from Laboratory Technicians, Field Service Engineers, Order Fulfillment Staff, Technical Staff/Scientist, and Production Workers. PL training will be conducted using a 1:1 trainer-to-trainee ratio.

#### 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

ACWDB's Program Finance Specialist of Business Services (dedicated administrator) will oversee the ETP Contract as well as provide administrative duties. Approximately 2–3 ACWDB staff will be dedicated to administrating the project, conducting the needs assessments, processing payments, and serving as the main contact liaison for PEs. Training will be conducted at each of the PE's facilities by its own SMEs.

#### Impact/Outcome

Upon completion of this ETP-funded training, trainees will earn in-house certifications on various manufacturing-operation procedures that will allow them to grow within the PE's companies.

#### Marketing and Support Costs

ACWDB is requesting, and staff recommends, 8% in support costs to assist with recruitment and training assessment. ACWDB markets programs through career service providers, its website, social media platforms, news blast and email communications, and through an extensive network of partners in fields of economic development, business industries, government agencies, and education. To its communities, ACWDB offers career services for adults and youths through community organizations such as Berkeley Youth Alternatives and La Familia/East Bay Community Services and International Rescue Committee. To recruit additional employers, ACWDB will work closely with city economic development directors, chamber of commerce, and the Biomedical Manufacturing Network to market the training.

#### Trainer Qualifications

Trainers will be the PE's own subject-matter experts (SME) ranging from the different occupations of Laboratory Technicians, Field Service Engineers, Order Fulfillment Staff, Technical Staff/Scientist, and Production Workers.

#### **Tuition Reimbursement**

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

## **DEVELOPMENT SERVICES**

N/A

## **ADMINISTRATIVE SERVICES**

N/A

## TRAINING VENDORS

N/A

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Communication Skills
- Interpersonal Skills
- Order Fulfillment
- Order Processing
- Sales

## COMMERCIAL SKILLS

- Indirect Material Storage
- Inventory Adjustment in SAP

## **CONTINUOUS IMPROVEMENT**

- Advanced Product Quality and Productivity
- CGMP Principles
- Clean Room Procedures
- Corrective and Preventive Action Policy
- COVID-19 Prevention
- Manufacturing Process Instructions
- Problem Solving Tools and Techniques
- Process Improvement
- Product Quality and Reliability
- Product Transfer / Workflow
- Quality Improvement Fundamentals
- Technical Presentation Skills
- Technical Qualifications and Certifications

## **MANUFACTURING SKILLS**

- Aseptic Processing
- Biosafety & Exposure Control Plan
- Chemical Hygiene Plan
- Emergency Action Plan
- FDA Regulatory Training
- Hazard Communication
- Injury & Illness Prevention Program
- Ladder Safety
- Equipment Maintenance Training
- Equipment Operations Training
- Quality Systems / Quality Access
- Safety Training

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

#### Productive Lab (PL) Hours

0-60

#### **PL- MANUFCTURING SKILLS** (1:1 trainer-to-trainee ratio)

- Blood Processing and Flow Cytometry
- Blood Sampling Techniques
- Blue Mountain System
- Body Weight and Tumor Measurement
- Cell Culture
- Copy Number
- Data Acquisition
- Documentation & Training Program Management System
- Environmental Management
- E-Quality System
- Equipment Cleaning and Maintenance
- Equipment Operations and Maintenance
- Genomic Titer
- Imaging and ROI Analysis
- Immunohistochemistry (IHC) Slide Scoring
- Immunohistochemistry (IHC) Tissue Screening
- Infectious Titer
- Instrument Calibration and Quality Control (QC)
- Instrument Testing and Packaging
- Management of Gas Handling Process
- Management of Handling Medical Waste
- Management of Material & Inventory
- Pipette Calibration
- Product Procedures
- R&D Projects for Reagent Validations
- Research / Pilot Scale
- Setup, Maintain, and Troubleshoot
- Shipping and Receiving Process
- Tissue Staining and Reading Slides

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

## Self-reported listing of potential employers participating in the contract

Contractor's Name: Alameda County Workforce Development Board	CCG No.: ET22-0178
Reference No: 21-0705	Page 1 of 1
ALPHABETIZE BY COMPANY NAME	
Company: Bayer	Priority Industry? 🛛 Yes 🗌 No
Address: 800 Dwight Way	
City, State, Zip: Berkeley, CA 94701	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 100	Small Business? 🗌 Yes 🖾 No
Total # of full-time company employees worldwide: 99,439	
Total # of full-time company employees in California: 1,000	
Company: BioGenex Laboratories Inc	
	Priority Industry? 🛛 Yes 🗌 No
Address: 48810 Kato Road, Ste. 200E	
City, State, Zip: Fremont, CA 94538	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 5	Small Business? 🛛 Yes 🗌 No
Total # of full-time company employees worldwide: 85	
Total # of full-time company employees in California: 15	
Company: Senti Biosciences, Inc.	Priority Industry? 🛛 Yes 🗌 No
Address: 2 Corporate Dr., 1 <sup>st</sup> Floor	
City, State, Zip: South San Francisco, CA 94080	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 30	Small Business? 🛛 Yes 🗌 No
Total # of full-time company employees worldwide: 77	
Total # of full-time company employees in California: 77	



**EXPANSION FUNDS** 

## **Training Proposal for:**

## Applied Materials, Inc.

## Contract Number: ET22-0154

Panel Meeting of: November 19, 2021

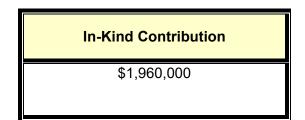
ETP Regional Office: San Diego

Analyst: S. Phillips

## PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative Veterans		Industry Sector(s):	Manufact Professic	turing (E) onal, Scientific Technology (54)	
	Expansion Fund	ds (Alt/Gen)		Priority Industry: 🛛Yes 🔲No		
Counties Served:	Santa Clara		Repeat Contractor:	🛛 Yes 🔲 No		
Union(s):	🗌 Yes 🛛 No					
Number of Employees in: CA: 5,000		CA: 5,000	U.S.: 6,500		Worldwide: 24,000	
Turnover Rate: 7%						
Managers/Supervisors: (% of total trainees)		14%				

## FUNDING DETAIL



Total ETP Funding	
\$498,640	

## TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours		Average Cost per	Post- Retention
No.		Type of Training	Trainees		СВТ	Trainee	Wage*
1	Retrainee	Computer Skills;	208	8-200	0-64	\$1,380	\$27.16
	Priority Rate	Mfg. Skills; Cont. Imp.		Weighte 60	•		
2	Retrainee	Computer Skills;	100	8-200	0-64	\$1,840	\$25.86
	Job Creation Priority Rate	Mfg. Skills; Cont. Imp.		Weighte 80	•		
3	Retrainee	Computer Skills;	30	8-200	0-64	\$920	\$27.16
	Veterans	Mfg. Skills; Cont. Imp.				-	
				Weighte 40	•		

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Numbers 1 & 3: \$20.86 for Santa Clara County Job Number 2(Job Creation): \$17.39 for Santa Clara County

**Health Benefits:**  $\Box$  Yes  $\boxtimes$  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	Actual Wage Range	Estimated # of Trainees				
Job Number 1 - Retrainees						
Administrators		18				
Technicians		50				
Engineers		100				
Scientists		40				
Job Number 2 – Job Creation						
Administrators		10				
Technicians		20				
Engineers		60				
Scientists		10				
Job Number 3 - Veterans						
Administrators		5				
Technicians		10				

Engineers	10
Scientists	5

## **INTRODUCTION**

Founded in 1967 and headquartered in Santa Clara, Applied Materials, Inc. (Applied) (<u>http://www.appliedmaterials.com/</u>) uses Nano manufacturing equipment, machines, and tools to make input products for semiconductor wafers and chips, flat panel displays, high density batteries, solar photovoltaic cells and modules, and other electronics. Nano manufacturing is the production of ultra-small structures that includes the engineering of thin films on substrates for use in a variety of electronic products. Customers include Intel, Samsung, Panasonic and Yingli.

This will be Applied's seventh ETP Contract; the fourth in the last five years.

## Veterans Program

Applied is committed to training 30 Veterans at its Santa Clara facility. Applied uses recruitment firms that specialize in hiring Veterans and maintains a web portal for Veterans to show how experiences in the military translate into careers at the Company.

## PROJECT DETAILS

The previous project focused on product innovations and manufacturing solutions. Applied now holds a larger role in California's electronics industry. A broad set of emerging technology trends such as the Internet of Things (IoT), Big Data, Clean Energy, and Electric/Autonomous driving is accelerating in the era of Artificial Intelligence (AI). Al is the central technology requirement for the next generation "Smart Everything" products in transportation, healthcare, entertainment, retail and in our homes. Semiconductors and semiconductor processing technologies have a key enabling role because AI is dependent on capturing, storing, processing, and understanding vast amounts of data quickly and accurately. Investments in AI's advanced manufacturing technologies has the potential to create billions of dollars in economic value for California. Training is needed for front-line technical employees located in Silicon Valley in materials sciences, engineering innovation, CAD/CAM, AI, and other advanced technology topics.

#### **Retrainee - Job Creation**

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

The role of technology in people's lives is expanding as the world adapts to the challenges that stem from COVID-19. Technological innovations have accelerated as work-from-home, home schooling and online retail drive investments in cloud data centers, clean energy, and communications infrastructure. The digital transformation of companies and the economy as a whole is driving up demand. It is also broadening the long-term growth drivers of the semiconductor industry from consumer-oriented devices to non-discretionary commercial investments in the IoT, AI, Clean Energy technologies and 5G networks. As a result, the Company currently has 100 new employees (Job Number 2).

## Training Plan

Training will be provided via Class/Lab, E-Learning and Computer–Based Training (CBT) in the following:

**Computer Skills:** Training will be provided to Engineers, Administrators and Technicians. The development and manufacturing of products is very complex and requires a high degree of technical knowledge. Applied will deliver advanced technology training through specialized and customized courses in Business System Processing, Advanced Manufacturing Control Systems, Software and Informatics, Advanced Manufacturing Lab Applications, Advanced eBusiness Applications, Advanced Desktop Productivity Applications, and Project Management. Training is intended to foster a high level of innovation and product development which will fuel the next generation of complex computer chips and display tools

**Continuous Improvement**: Training will be provided to all occupations to drive compliance and quality performance throughout the organization. Trainees will learn continuous improvement techniques to reduce costs, improve teamwork, become more effective as employees, and improve problem-solving. Product knowledge and marketing techniques courses will be delivered to engineers to allow them to market sophisticated manufacturing and advanced technological products used to build complex computer chips and displays to its growing global customer base. Training will also include Advanced Product Quality and Reliability, Design Tools and Practices, Failure Modes and Effects, Process Improvement and problem solving tools/techniques.

**Manufacturing Skills**: Training will be provided to Technicians, Engineers and Scientists. Training will include Lithium Surface/Interaction Overview, Physics of Electrode Coating, Nanoscale device physics and technology, Thin Film Surface/Interaction overview, Physics of Radiofrequency plasmas, Electromagnetic properties, waves and dielectric constants, and Particle and energy balance global models.

## Computer-Based Training

CBT will be provided to all occupations in Continuous Improvement, Computer and Manufacturing Skills. CBT will allow employees to take courses at their own pace without instructor interaction.

#### AB 118 Projects

- Applied Materials had an AB118 Contract (ET17-0801), with a term from 11/7/16 to 11/6/18 (already closed out). Of an estimated 434 trainees, 1101 trainees were enrolled and received the minimum hours of training. The Contractor earned the full approved amount of \$749,952.
- Applied Materials had another AB118 Contract (ET15-0802), from 12/1/14 to 11/30/16. Of an estimated 350 trainees, 1096 trainees were enrolled and received the minimum hours of training. The Contractor earned the full approved amount of \$598,500.

## Commitment to Training

Applied's annual statewide training expenditures in California for non-ETP related training is \$3,000,000. Training includes OSHA and government-mandated safety regulations; sexual harassment prevention; basic job skills; desktop training in Microsoft Word, Excel, and PowerPoint; and executive development training programs. 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

Applied is ready to start training upon approval. Training will be administered by the Company's Learning and Development Department which oversees workforce training across the organization and operates under the direction of its Human Resources Department. Two full-time employees and two Managers will work directly with the third-party subcontractor, Herrera & Company, to administer the proposal. Trainers will be delivered by vendors and in-house experts.

### **Electronic Record Keeping**

The LMS has been reviewed and approved by ETP staff and will be used for reporting trainee hours under this agreement.

#### RECOMMENDATION

Staff recommends approval of this proposal.

## PRIOR PROJECTS

The following table summarizes Contractor's performance under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0286	Santa Clara	11/05/18- 11/04/20	\$894,920	\$894,920 (100%)
ET15-0306	Santa Clara	12/01/14- 11/30/16	\$498,000	\$456,969 (92%)

# DEVELOPMENT SERVICES

Herrera & Company in Stockton assisted with development for a flat fee of \$8,750.

# **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/E-Learning Hours

8-200

# COMPUTER SKILLS

- Business System Processing
- Advanced Manufacturing Control Systems
- Software and Informatics
- Advanced Manufacturing Lab Applications
- Advanced eBusiness Applications
- Advanced Desktop Productivity Applications
- Project Management Software Tools

## CONTINUOUS IMPROVEMENT

- Lab Automation and Robotics
- Advanced Product quality and reliability
- Design Tools and Practices
- Failure Modes and Effects analysis
- Process Improvement Training
- Problem Solving Tools and Techniques
- Leadership/Coaching Skills

## MANUFACTURING SKILLS

- Lithium surface/interaction overview
- Physics of electrode coating
- Nano-scale device physics and technology
- **4** Thin film surface/interaction overview
- Physics of radiofrequency plasmas
- Particle and energy balance, global models

#### CBT Hours

0-64

#### **COMPUTER SKILLS**

- SAP Management and Manufacturing Control Systems (8 hrs.)
- Advanced ERP system training and reporting (1 hrs.)
- Business System Processing (6 hrs.)
- Advanced Project Management Software (16 hrs.)
- Advanced CAD/CAM Applications (4 hrs.)

#### CONTINUOUS IMPROVEMENT

- Zero Defect Quality and Reliability (.5 hrs)
- Design tools and practices (2 hrs.)
- Design for excellence (10 hrs.)
- Quality fundamentals/core skills (12 hrs.)
- Failure modes and effects analysis (3 hrs.)
- Process improvement training (1.5 hrs.)

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



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

# **Training Proposal for:**

# **AWT** Construction Group, Inc.

# Contract Number: ET22-0156

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

# PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Priority Rate Retrainee Job Creation Initiative		Industry Sector(s):	Construc Priority Ir	tion (C) ndustry: ⊠Yes   □No
Counties Served:	Solano		Repeat Contractor:	☐ Yes ⊠ No	
Union(s):	🗌 Yes 🛛 No				
Number of Employees in: CA: 101		CA: 101	U.S.: 101		Worldwide: 101
Turnover Rate: 10%					
Managers/Supervisors: 10%		10%			

# **FUNDING DETAIL**

In-Kind Contribution \$224,101

Total ETP Funding	
\$144,532	

# TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours Class /		Average Cost per	Post- Retention Wage*
No.			Trainees		CBT	Trainee	
1	Retrainee Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., Literacy Skills, Mgmnt. Skills, OSHA 10/30, PL-Comm'l. Skills	75	8–200 Weighte 47	-	\$1,081	\$19.12
2	Job Creation Retrainee Priority	Business Skills, Comm'I. Skills, Computer Skills, Cont. Imp., Literacy Skills, Mgmnt. Skills, OSHA 10/30, PL-Comm'I. Skills	31	8–200 Weighte 89	•	\$2,047	\$17.00

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1: \$19.12 per hour for Solano County				
Job Number 2(Job Creation): \$15.65 per hour for Solano County				
<b>Health Benefits:</b> 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 \$2.12 per hour may be used to meet the Post-Retention Wage for Job Number 1.				

Up to \$2.12 per nour may be used to meet the Post-Retention wage for Job Number 1.								
Wage Range by Occupation								
Occupation Titles Actual Wage Range Estimated # c Trainees								
Job Number 1 (Retrainee):								
Field Crew		3						
		17						
		41						
Marketing		1						
Supervisor/Manager		7						
Administrative Staff		2						
		4						
Job Number 2 (Job Creation):								
Field Crew		5						
		18						
Estimator		5						

AWT Construction Group, Inc.	November 19, 2021	ET22-0156
Supervisor/Manager		2

# Supervisor/Manager 2 Administrative Staff 1

# **INTRODUCTION**

Founded in 2010 and headquartered in Benicia, AWT Construction Group, Inc. (AWT Construction) (<u>https://awtconstructioninc.com</u>) offers construction services including reconstruction, roofing, HVAC, electrical, and more to owners and managers of residential and commercial properties. ETP training will be delivered at the Company's two training sites in Benicia, at customer jobsites, and/or at training vendors' sites.

This will be AWT Constructions' first ETP Contract. ETP-funded training in this proposal will enable the Company to provide skills-upgrade training for incumbent and newly hired staff to stay current with new technologies and systems used in the construction industry. The proposed project supports business growth in terms of expanding the Company's new in-house products and services while rapidly expanding its service territories inside California.

#### Veterans Program

Although this proposal doesn't include a Veteran's (Job Number) component, AWT Construction's recruitment efforts includes using local-workforce agencies like CalJOBS to recruit veterans for all positions.

#### **Retrainee - Job Creation**

In this proposal, the Company plans to hire 31 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

AWT Construction recently invested \$150,000 on equipment for excavation, lifting, bending, and cutting sheet metals and on a jetting machine that supports the Company's new HVAC services and clearing plumbing lines or other common constructions tasks it encounters during contracted work. This business-capacity growth and expansion of in-house services such as painting reportedly reduces the need for subcontracting, but does require upskilling employees on a variety of specialties and changes that occur within the various trades to remain competitive.

Additionally, AWT Construction confirms it has ample space at its existing two facilities in Benicia to house these new employees especially since the job site is typically a customer's multi-family and commercial-construction projects in the Company's service area.

#### PROJECT DETAILS

#### Training Plan

Training will be provided via Class/Lab, E-Learning, Computer-Based Training (CBT) and Productive Lab (PL) in the following:

**Business Skills**: Training will be offered to all occupations and include Time Management and Customer Service to improve efficiency and competiveness as the Company moves into new services and new territories.

**Commercial Skills**: Training will be offered to Field Crew, Estimators and Supervisors/Managers and include Estimating, Waterproofing and Demolition to improve accuracy in estimating jobs, improve safety, and upgrade staff's skills in construction tasks to reduce the use of vendors.

**Computer Skills**: Training will be offered to all occupations and include Customer Relationship Manager (CRM) due to recent re-organization and expansions from consolidations. Best practices for the coordination of expanding territories and unified approaches that can strengthen inventory controls using computer-related tools and software aimed to make accounting more reliable and dependable.

**Continuous Improvement**: Training will be offered to all occupations and include 5S Change Management and Team Building to bring existing and new employees up to speed on the various territories' rules and requirements (building codes). Cost-saving efforts by adding new services (while decreasing dependency on subcontractors) requires this training on new trades/services as the Company is introducing an entirely new paint division.

**Literacy Skills**: Vocational English as a Second Language will help Field Crew increase performance and impact AWT Construction's goals to increase efficiency. Use of the Company's CRM software to track jobs' progress and the location of specific equipment is anticipated to improve as a result of this proposed training.

**Management Skills:** Training will be offered to Supervisors/Managers and include Supervisory Skills and How to Coach and Mentor to help those in management roles excel and reach goals like supporting AWT Construction's plans to double its revenues over next three years. As the Company grows, leadership is key to its success.

## **Productive Laboratory**

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

AWT Construction estimates that 64 Field Crew trainees will receive approximately 100 hours of PL-Commercial Skills training. While some PL training is for its incumbent workforce, the Company's newly-hired staff will receive the majority of the PL hours. PL training will utilize an experienced trainer to specify the scope of work, to explain the process and needed equipment, and to verify that the trainee understands standards and specifications. The trainer will observe the employee perform the task, provide feedback, assist with re-work if necessary, and ensure that the task has been performed correctly to ensure that the employee understands the process and is proficient in the task.

The PL trainer-to-trainee ratio will not exceed 1:3. AWT Construction requests and states that PLtraining groups of up to ten are needed as many tasks in construction require multiple people and can't be done alone like moving large items or building scaffolding. While classroom training is part of construction industry's training methodology, there is a heavy emphasis in construction trades on experiential or on-the-job (OJT) training. Construction work is often done in phases and being trained to respond to live scenarios is an important part of gaining skills to the point of proficiency. Thus, any PL training past the point of proficiency with not count for reimbursement.

# Certified Safety Training

1. <u>OSHA 10/30.</u> 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.

#### Computer-Based Training

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0–30 hours of CBT.

#### Commitment to Training

The Company spends an estimated \$140,000 on training annually in California. AWT Construction offers basic training via classroom and productive lab (OJT) across all of its occupations in safety related and essential regulatory training topics. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Senior Vice President of HR (dedicated administrator) will oversee all administration of the project, along with one Superintendent at each of its two participating facilities to help coordinate and manage the project internally. Training will be delivered by six in-house experts and vendors as needed. A third-party subcontractor has been retained to assist with ETP administration.

#### Impact/Outcome

ETP funding will supplement AWT Construction's mandatory-vocational training to improve efficiency and competiveness with its new product and service offerings (new paint crew and inhouse sheet-metal fabrication). ETP funds will support the Company's plans to double revenues over next three years, while also supporting its ongoing growth in demand and expansion into new territories as it hires new staff, increases contracts, and improves accuracy in estimating jobs and safety. Additionally, ETP training will result in 8 (estimated number) OSHA10/30 certifications.

#### Recordkeeping

Due to the COVID-19 pandemic, the Company will use alternate recordkeeping.

#### DEVELOPMENT SERVICES

Sierra Consulting Services in Cameron Park assisted with development for a flat fee of \$14,000.

#### ADMINISTRATIVE SERVICES

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

#### TRAINING VENDORS

To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8–200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Cost Control
- Dealing with Difficult People
- Interpersonal Communication
- Leadership
- Marketing/Sales Techniques & Strategy
- Negotiating
- Operational Skills
- Organizational Structure Development
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Retaining Customers
- Relationship Building
- Strategic Planning
- Time Management

#### COMMERCIAL SKILLS

- Building Systems
- Change Order Negotiations
- Confined Space
- Construction Contract Administration
- Construction Cost Awareness and Production
- Logistics/Sequencing
- Project Management
- Construction Methodologies (LEAN)
- Construction Quality Management
- Construction Team Support
- Contract Documents
- Engineering Theory/Planning/Design
- Environment Impact Planning
- Estimating
- Foreman's Advantage
- Forklift/Scissor Lift
- Landscape Construction
- Lien Remedies
- Lock Out/Tag Out

- Mechanical, Electrical, and Plumbing
- Personal Protection Equipment
- Planning and Scheduling
- Product Knowledge
- Tenant Improvements
- Traffic Control
- Work Order Processing

## **COMPUTER SKILLS**

- Advanced Excel
- Computer-Aided Design Software
- Customer Relationship Manager
- Enterprise Resource Planning
   Foundations Software

## **CONTINUOUS IMPROVEMENT**

- 5S
- Construction Trade Cross Training
- Train the Trainer
- Communication Skills
- Creating a Quality Organization
- Change Management
- Decision Making
- Effective Meetings for Leaders
- Meeting Management
- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Problem Solving and Decision Making
- Process Capability
- Quality Measurement Systems
- Team Building
- Teamwork Development Skills
- Time Management
- Visual Controls

# **MANAGEMENT SKILLS** (Supervisors/Managers Only)

- Managing Subcontractors
- Coaching
- Develop Employee Accountability
- Employee Engagement
- Essential Skills for New Supervisor

#### OSHA 10/30 (OSHA-Certified Instructor-1:40 Ratio)

- OSHA 10
- OSHA 30

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

#### LITERACY SKILLS

• Vocational English as a Second Language

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

#### Productive Lab Hours (1:3 Ratio)

0–100

## **COMMERCIAL SKILLS**

- Stucco
- Framing
- Sheet Rocking
- Concrete Forming
- Construction Job-Site Logistics/Sequencing
- Demolition
- Landscape Construction
- Mechanical, Electrical, and Plumbing
- Painting
- Roofing
- Traffic Control
- Waterproofing

# CBT Hours

0–30

## <u>OSHA 10</u>

- Caught In or Between (0.5 hr.)
- Cranes, Derricks, Hoists, Elevators & Conveyors (0.5 hr.)
- Electrocution (1 hr.)
- Excavations (0.5 hr.)
- Falls (1.5 hrs.)
- Health Hazards in Construction (0.5 hr.)
- Introduction to OSHA (1 hr.)
- Materials Handling, Storage, Use and Disposal (0.5 hr.)
- Personal Protective and Lifesaving Equipment (0.5 hr.)
- Scaffolds (0.5 hr.)
- Stairways and Ladders (0.5 hr.)
- Struck-By (1 hr.)
- Tools Hand and Power (0.5 hr.)

#### <u>OSHA 30</u>

- Asbestos Awareness (0.5 hr.)
- Asbestos for Supervisors (2 hrs.)
- Caught-in or Between (1.5 hrs.)
- Confined Spaces (0.5 hr.)
- Cranes, Derricks, Hoists, Elevators and Conveyors (0.5 hr.)
- Electrical Safety (2 hrs.)
- Ergonomics (0.5 hr.)
- Excavations (0.5 hr.)
- Fall Prevention (1.5 hrs.)
- Fire Protection and Prevention (0.5 hr.)
- Foundations for Safety Leadership (2.5 hrs.)

- Hand and Power Tool Safety (1 hr.)
- Hazard Communication (0.5 hr.)
- Hazardous Materials (0.5 hr.)
- Health Hazards in Construction (2 hrs.)
- Introduction to OSHA (1 hr.)
- Lead Awareness (0.5 hr.)
- Lead Exposure (0.5 hr.)
- Managing Safety and Health (2 hrs.)
- Materials Handling, Use and Disposal (0.5 hr.)
- Motor Vehicles (0.5 hr.)
- Personal Protective Equipment (2 hrs.)
- Rollover Protective Structures, Signs, Signals and Barricades (0.5 hr.)
- Safety and Health Programs (0.5 hr.)
- Scaffolds (0.5 hr.)
- Silica Exposure (0.5 hr.)
- Stairways and Ladders (1 hr.)
- Steel Erection (0.5 hr.)
- Struck-by (1 hr.)
- Welding and Cutting (0.5 hr.)

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



# **EXPANSION FUNDS**

# **Training Proposal for:**

# Bricklayers and Allied Craftworkers Local No. 3 Apprentice Training Trust

# Contract Number: ET22-0942

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: C. Kaiser

# PROJECT PROFILE

Contract	Priority Rate	Industry	Construction (C)	
Attributes:	Retrainee	Sector(s):		
	Apprenticeship			
	Veterans			
	Expansion Funds (Alt/Gen)		Priority Industry: 🛛 Yes 🗌 No	
Counties		Repeat		
Served:	Multiple Counties	Contractor:	🛛 Yes 🗌 No	
Union(s):	Yes INo Bricklayers and A	Allied Craftwo	orker Local Union No. 3	
Turnover R	late:	≤20%		
Managers/Supervisors: (% of total trainees)		N/A		

# FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$121,744		\$9,390 Jobs 1 & 2: 8% Job 3: 20%		\$131,134
In-Kind Contribution:	50% of	Total ETP Funding Required		Inherent

# TRAINING PLAN TABLE

Job No.	Job Description	Type of Training			Range of Hours Class / CBT		Post- Retention
			Trainees	Lab	СЫ	Trainee	Wage*
	Priority Rate	Comm'l. Skills,	8	8-200	0	\$393	\$33.00
	Journeyworker	OSHA 10/30		Weighte 16	•		
	Retrainee	Comm'l. Skills, OSHA 10/30	61	8-210	0	\$1,925	\$20.89
	Apprentice			Weighte 100	•		
	Retrainee	Comm'l. Skills,	5	8-210	0	\$2,113	\$20.89
	Apprentice Veteran	OSHA 10/30		Weighte 100	•		

\*Post-Retention Wage is the Contractual Wage

**Minimum Wage by County:** Job Numbers 1-3: \$20.86 per hour for Alameda, Marin, San Mateo, Santa Clara and San Francisco counties; \$20.79 per hour for Contra Costa County; \$19.77 per hour for Los Angeles County; \$19.12 per hour for all other counties

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

Used to meet the Post-Retention	n 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	Actual Wage Range	Estimated # of Trainees					
Job Number 1							
Journeyworker Bricklayer, Marble Mason, Marble							
Finisher, Pointer-Cleaner-Caulker, Terrazzo Finisher,		8					
Terrazzo Mechanic							
Job Number 2							
Apprentice Bricklayer		10					
		11					
Apprentice Marble Finisher		1					
		1					
Apprentice Marble Mason		5					
Apprentice Pointer-Cleaner-Caulker		24					
Apprentice Terrazzo Finisher		3					
		4					

Apprentice Terrazzo Mechanic	2	
Job Number 3		
Veteran Apprentice Bricklayer	1	
Veteran Apprentice Marble Finisher	1	
Veteran Apprentice Marble Mason	1	
Veteran Apprentice Pointer-Cleaner-Caulker	1	
Veteran Apprentice Terrazzo Finisher	1	

# INTRODUCTION

The Mason Development Center with the support of Bricklayers and Allied Craftworkers Local No. 3 Apprentice Training Trust (BAC Local 3) and its 200 signatories have been training Apprentices throughout Northern California since 1970. All training for BAC Local 3 takes place at the Mason Development Center training site located in Tracy. Trainees of BAC Local 3 serve employers throughout 46 Northern California counties. The mission of the BAC Local 3 is to ensure that workers have the technical, professional, and safety skills necessary to build and service commercial and residential buildings. This is BAC Local 3's second ETP Contract and the second in the last five years.

BAC Local 3 trains a diverse group of workers. The occupations trained in this proposal will be Bricklayers, Pointer-Cleaner-Caulker (PCC) workers, Marble Finishers, Marble Masons, Terrazzo Finishers and Terrazzo Mechanics. Bricklayers are skilled crafts persons, who properly position masonry units and create efficient, beautiful buildings and other structures. The PCC workers' work ranges from cleaning and replacing mortar, caulking, applying sealants, injecting epoxy and patching mortar. Marble Masons perform various work processes including cutting, tooling and setting marble slabs in floors and walls of buildings. Marble Finishers perform a variety of tasks to assist the Marble Mason. Trained Terrazzo workers install glass, ceramic and stone tile. Installation includes laying, cutting, or setting of materials used for floors, walls, ceilings, walks, promenade roofs, exterior veneers, stair treads, stair risers, facing, hearths, fireplaces and decorative inserts. Finishers do most of the setting up of materials and the before and after clean up. Finishing is very active work and is often strenuous. Work is both indoors and outdoors and may involve scaffolding. Trainees from all occupations come to the training center and are trained year-round.

#### Veterans Program

BAC Local 3 is committed to Veteran recruitment and hiring in its program and anticipates training five Veterans (Job Number 3) in this proposal. BAC Local 3 recruits through programs like Helmets to Hardhats and is also an approved GI Bill site. This allows Veterans to receive GI Bill benefits that can be put towards paying for cost of training in the program. Veterans in the Apprenticeship program are eligible to receive Montgomery GI Bill benefits, such as a monthly housing allowance. As an incentive to join the program, BAC Local 3 waives initiation fees and provides streamlined admissions processes for Veteran applicants.

The Veteran-training curriculum in this proposal will be the same as Apprentice training. These trainees are in a separate Job Number to better track performance toward ETP's goal of improved outreach for veterans.

#### Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. Terrazzo Finishers and Marble Finishers are two years and six months; Marble Masons and Terrazzo Mechanics are three years; and Pointer-Cleaner-Caulkers and Bricklayers are three years and six months. The curriculum is developed with input from DAS and a designated Local Educational Agency in this case Hayward Unified School District.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour.

# PROJECT DETAILS

ETP funding will allow BAC Local 3 to meet the challenges of staying competitive by giving workers the skills needed to stay employed in the building trades industry. Trainees will receive training in updated building standards and green business practices necessary to meet commercial interest and demand to develop and retrofit buildings with greener materials. Equipment and materials not used correctly can lead to expensive re-work and delays in schedules. Trainees will learn to work more efficiently with the materials, thus reducing scrap and re-work. The commercial training will help unionized contractors manage their costs by sending well-prepared workers out on jobs.

Population and business growth, coupled with the increasing popularity of tile and marble are the major sources of demand for Terrazzo and Marble Finishers. Tile and natural stone are used heavily in shopping malls, hospitals, schools, and restaurants, as well as other commercial and government buildings, and this trend is expected to continue. Tiles, including those made of glass, mosaic, and other high-end tiles and marble, are also becoming more popular, particularly in new and remodeled homes. Current projects for BAC Local 3 include Sky River Casino in Elk Grove, New Sacramento County Courthouse, San Quentin Boiler Replacement at San Quentin Penitentiary, South San Francisco Library, Parks and Rec Center Community Campus, Mission Rock Parcel "A" San Francisco, Modesto Courthouse, and the New Terminal Fresno Airport.

#### Training Plan

Training will be delivered via Class/Lab and E-Learning in the following:

**Commercial Skills:** Training will be offered to all occupations to be prepared for upcoming BAC projects. Journeyworkers will receive training in Fork lift and Mobile Elevated Work Platform. For Apprentices, courses include Blueprint Reading, Green Construction LEED Certification, Building Codes, Waterproofing and Construction Sequence.

**Certified Safety Training:** <u>OSHA 10/30.</u> This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journeyworkers and apprentices 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.

#### Marketing and Support Costs

Through direct mailings, personal contacts, telephone calls, public service announcements, emails, and its website, the BAC Local 3 will disseminate class information throughout the year to all apprentice setter and finishers within the local's jurisdictions as well as to the contractors who employ them. Application announcements for the apprentice program will be sent to local, state and federal agencies as well as to local high schools, community colleges and community-based organizations. There are two staff people that will assist with the marketing, recruitment, needs assessments and scheduling of training.

BAC Local 3 requests 8% support costs for Job Numbers 1 and 2 and 20% for Job Number 3 (Veterans). Many participating employers have already been recruited, but more recruitment and assessment activities are needed.

#### 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 overseen by BAC Local 3 Training and Apprenticeship Coordinator. BAC Local 3 staff will schedule classes and provide training coordination. Three trainers will conduct the training. Training will occur either E-Learning or in-person at the Mason Development Training Center. A third party administrator will provide administrative services for the ETP Contract.

#### Trainer Qualifications

Trainers at BAC Local 3 are experienced Journeyworkers who have experience and formal instruction in training methods and subject matter.

#### Impact/Outcome

Certifications earned for the Journeyworker and Apprentice training include: OSHA 10, OSHA 30, and Forklift.

#### **Tuition Reimbursement**

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

# ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0949	\$101,668	9/8/2020 – 9/7/2022	36	0	0

Based on ETP Systems, 1,681 reimbursable hours have been tracked for potential earnings of \$60,429 (59% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through 9/7/2022.

## DEVELOPMENT SERVICES

Strategy Workplace Communications in Alameda and California Labor Federation in Oakland assisted with development of this proposal for no fee.

#### ADMINISTRATIVE SERVICES

Strategy Workplace Communications will also perform administrative services for a fee not to exceed 13% of payment earned.

#### TRAINING VENDORS

To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200 Job Number 1 Trainees may receive any of the following:

#### Journeyworker Training

#### **COMMERCIAL SKILLS**

- Folk Lift
- Mobile Elevated Work Platform

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

- OSHA 10
- OSHA 30

#### Class/Lab/E-Learning Hours

8-210 Job Numbers 2 & 3

Trainees may receive any of the following:

#### Apprentice Training

#### **COMMERCIAL SKILLS**

Terrazzo

- Blueprint Reading
- Building Codes
- Cleaning and Sealing Terrazzo
- Construction Sequence
- Cutting Control Joints
- Design Layout
- First Aid/CPR
- Floor Layout and Installation
- Green Construction, Design, Materials, Methods and Techniques, LEED Certification
- Grouting and Caulking
- Hand Tool and Equipment, Proper Use and Safety
- Materials, Identification, Characteristics, and Estimating
- Membranes and Underlayments
- Mixing Mortar and Bonding Materials
- Repair and Renovation of Terrazzo
- Scaffold Safety Training
- Substrates, Mixing and Bonding Materials
- Terrazzo Materials, Handling
- Trade Math

#### Bricklayer

- Blueprint Reading
- Building Arches
- Building Codes
- Building Radius Walls

- Construction Sequence
- Cutting and Welding Steel
- Drawing and Sketching Techniques
- First Aid/CPR
- 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

Marble, Pointer-Cleaner-Caulker Workers

- 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
- First Aid/CPR
- 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

#### OSHA 10/30 (all trades) (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

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

Note: Reimbursement for Job Number 1 (Journeyworkers) is capped at 200 total training hours per trainee; and Job Numbers 2 and 3 (Apprentices) are capped at 210 total training hours per trainee, regardless of the method of delivery.



# **EXPANSION FUNDS** Training Proposal for:

# **Carpenters Training Trust Fund for Northern California**

# Contract Number: ET22-0930

# Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: K. Mam

# PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Construction (c)	
	Apprenticeship			
	Expansion Funds (Alt/Gen)		Priority Industry: 🖂 Yes 🔲 No	
Counties		Repeat		
Served:	Northern & Central California	Contractor:	Yes 🗌 No	
Union(s):	Yes Do United Brotherho	ood of Carpe	nters and Joiners of America	
Turnover Rate:		≤20%		
Managers/Supervisors: (% of total trainees)		N/A		

# **FUNDING DETAIL**

Program Costs	+	Support Costs	=	Total ETP Funding
\$559,440		\$38,850 8%		\$598,290
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 Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Apprentice Priority Rate	Commercial Skills	259	8-200 Weightee 120	•	\$2,310	\$31.79

#### \*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Job Number 1(SET/Priority Industry): \$26.08 per hour.
CBA wages have been verified
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	Post-Retention Wage Range	Estimated # of Trainees		
Apprentice Carpenter		259		

#### INTRODUCTION

Carpenters Training Trust Fund for Northern California (CTTF) (<u>www.ctcnc.org</u>) provides Pre-Apprentice, Apprentice and Journeyworker training services for union Carpenters throughout Northern California. It is headquartered in Pleasanton and operates five training centers. CTTF is funded by a joint labor and management trust, as agreed to in collective bargaining.

Representatives from the United Brotherhood of Carpenters and Joiners of America, which includes 27,500 Journeyworker Carpenters, serve on CTTF and the Board of Trustees. Signatory employers also serve on both the Committee and the Board, through the Construction Employers' Association of California. CTTF also provides training for 6,000 registered Apprentices in 46 counties across Northern and Central California. This is CTTF's eleventh project, and the seventh in the last five years.

#### Veterans Program

CTTF works in cooperation with Helmets-to-Hardhats, a national joint labor-management program to help transition active duty military personnel into employment in the construction industry, including Apprenticeship programs. However, a Veterans component is not included in this proposal for ease of administration.

#### Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental

Instruction portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is four years. The curriculum is developed with input from DAS and a designated Local Educational Agency.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour. The ETP wage for Apprentices is no less than \$26.08 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

## PROJECT DETAILS

Apprentice training will give workers new to the trade the basic skills they need to succeed in a long-term career and provide union contractors with the skilled workers they need to staff construction projects. As the requirements of the industry continue to change, workers must improve skill sets. The program was developed and is operated as a coordinated, collaborative team composed of the union, union members and contractors.

To successfully compete for jobs, union contractors need the best trained, most productive workers. There is a need for a highly productive workforce, with all workers ready to do their jobs on the first day of work. In addition, construction work has become more complex and workers at all levels must have higher levels of skills to succeed and certifications to validate those skills.

#### Training Plan

Training will be provided via Classroom/Laboratory and E-Learning in the following:

**Commercial Skills:** Training will include Drywall/Lathering, Insulating, Pile Driving, Shingling, Acoustical Installing, Hardwood Floor Laying, Millwrighting or Scaffold Erecting.

#### 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

The Executive Director, with the assistance of three part-time staff members, will be responsible for marketing, recruitment, scheduling training and ETP administration. CTTF has also retained the services of a third party consultant to assist in administration of the project.

#### Impact/Outcome

Training may result in one or more of the following industry certifications: Aerial Lift Safety, Asbestos Abatement, Bridge Building, Commercial Door Hardware, Concrete Formwork, Confined Space Entry, Fall Protection, Fork Lift Operator Safety, Green Building Awareness, Hazardous Waste General Site Worker, Lead Abatement, Lockout/Tagout, Material Safety Data Sheets, Rigging, Scaffold Erecting, Scaffold User, Solid Surface Materials Installation and Welding.

#### Learning Management System

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

#### Marketing and Support Costs

Employers participate as members of CTTF and are notified of training through CTTF's website, mailings, and presentations. Although these are signatory employers, additional recruitment is still needed. CTTF partners with the following organizations and gives special consideration to graduates from their program for entry into the Apprenticeship program: UBC Job Corps, JobTrain, Fresno County Office of Education, Cypress Mandela in Oakland, Metropolitan Educational District in San Jose, Monterey Adult School, Richmond Works, San Francisco Unified School District, Stockton Youth Build, Tulare County Office of Education, and CityBuild in San Francisco. CTTF requests, and staff recommends, 8% in support costs for marketing, recruitment, and assessment activities.

#### Trainer Qualifications

Trainers are qualified professionals in the field and are subject-matter experts.

#### **Tuition Reimbursement**

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

#### ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0909	\$427,350	7/1/20 – 6/30/22	1,329	0	0

Based on ETP Systems, 43,884 reimbursable hours have been tracked for potential earnings of \$427,350 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through June 2022.

#### PRIOR PROJECTS

The following table summarizes Contractor's performance by CTTF under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET20-0912	Central & Northern California	8/1/19 – 7/21/21	\$748,440	\$748,440 (100%)

ET19-0905	5 Central & Northern 8/1/18 – California 7/31/20		\$949,588	\$948,640 (100%)
ET18-0903	Central & Northern California	7/5/2017- 7/4/2019	\$948,640	\$948,640 (100%)
ET17-0902	Central & Northern California	8/1/16- 7/31/18	\$948,970	\$948,970 (100%)
ET16-0907	Central & Northern California	8/31/15– 8/30/17	\$948,416	\$948,416 (100%)

# **DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development 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

#### Class/Lab/E-Learning Hours

8-200 Trainees may receive any of the following:

#### **COMMERCIAL SKILLS**

Carpentry

- Blueprint Reading Advanced
- Blueprint Reading Basic
- **G** Commercial Door Hardware
- Commercial Steel Framing
- Concrete Bridge Building
- Concrete Formwork
- Concrete Structures/Equipment/Safety/Green Technologies
- Engineered Structural Systems
- Exterior Finish
- ♣ Foundations & Floors
- Interior Finish
- Introduction to Welding & Cutting
- Layout Instruments
- 4 Rigging
- Roof Framing
- Stair Building
- Wood Framing

#### Drywall/Lathering

- Advanced Construction Techniques
- 4 Applied Blueprint Technology
- Arches, Furring & Advanced Systems
- Basic Applications
- Blueprint Reading I
- Blueprint Reading II
- Commercial Framing Systems and Fire Stop
- Doors, Frames, Hardware & Windows
- Drywall/Lathing, Trade Safety
- Exterior Systems & Trims
- Interior Metal Lath Systems
- Mathematics Review
- Residential Metal Stud Framing
- Shaft Protection & Ceiling Systems
- Welding (Heavy Plate)
- Welding (Light Gauge)

#### Insulating

- CalGreen
- Lift Commercial & Industrial Insulation Installation, Aerial Lift
- Commercial Blueprint Reading for Insulators, Welded Frame-Mobile Tower Scaffolds
- Construction Math, Intro to Working Drawings for Insulators, Firestop

- Energy Conservation Codes and Standards for Insulators
- Green Advantage
- Residential Blueprint Reading for Insulators, Fork Lift, Driver Safety Training
- Residential Insulation Installation and Weatherization

#### **Pile Driving**

- Advanced Formwork
- 4 Advanced Pile Driving Land & Water
- Bridge Building & Advanced Structural Blueprints
- Concrete & Formwork
- Falsework, Shoring & Heavy Timber Framing
- Introduction to Pile Driving Land & Water Aerial Lifts
- Introduction to Structural Blueprints & Layout Instruments
- 4 Rigging
- + The Pile Driver Apprentice & The Trade, Construction Math
- ✤ Welding 1 SMAW (Shielded Metal Arc Welding) 1F, 2F, 3F, 4F
- Welding 2 SMAW 1G, 2G Fork Lifts
- Welding 3 SMAW 3G Certification
- Welding 4 SMAW 4G Certification
- Welding 5 FCAW 3G Certification
- Welding 6 FCAW 4G Certification
- Wharfage & Marine Structures
- Worker Safety & Tool Skills for Pile Drivers Fall Protection

#### Shingling

- Blueprint Reading Advanced
- Blueprint Reading Basic, Union Benefits Presentation
- Flashing, Shakes & Composition
- Rigging
- ♣ Shingles, Sidewalls, Tile & Metal

Acoustical Installing

- Access Floor Systems
- Blueprint Reading Advanced
- Blueprint Reading Basic, Union Benefits Presentation
- Commercial Steel Framing
- Installation of Exposed & Concealed Grid Ceilings
- Integrated Ceilings & Special Techniques
- Introduction to Welding & Cutting
- Layout Instruments
- Special Ceiling Systems, Aerial Lift.
- Welded Frame & Mobile Tower Scaffold

Hardwood Floor Laying

- 4 Athletic Floors, Finishing & Repairing Floors
- Blueprint Reading Advanced
- Blueprint Reading Basic, Union Benefits Presentation
- **4** Tools of The Trade, Installation of Wood Floors

Millwrighting

- Blueprint Reading Aerial Lift
- Conveyors
- Cutting & Welding 1
- Installation of Machinery
- Layout Procedures Fork Lift (Industrial & Rough Terrain)
- Maintenance of Machinery
- Materials of Construction
- Math Applications Fall Protection
- Millwright 16 Hour Safety & Millwright Tool Skills
- Monorails
- Optical Instruments
- Precision Tools & Shaft Alignment
- Rigging
- The Millwright Apprentice & The Trade
- **Turbines**
- ♣ Welding 2 SMAW
- Welding 3 Certification

#### Scaffold Erecting

- Blueprint Reading Advanced
- Blueprint Reading Basic, Union Benefits Presentation
- **4** Blueprint Reading for Scaffold Erectors
- Hazard Awareness Aerial Lift
- Introduction to Scaffolds Confined Space
- Introduction to Welding & Cutting
- Layout Instruments
- Rigging
- Suspended Scaffolds, Shoring Systems
- System Scaffold
- **4** Tube & Clamp Scaffold
- Welded Frame & Mobile Tower Scaffold
- \rm Welding

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.



**EXPANSION FUNDS** 

# **Retrainee-Job Creation**

# **Training Proposal for:**

# Cook General Engineering, Inc.

# Contract Number: ET22-0146

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: A. Reyes

# PROJECT PROFILE

Contract Attributes:	SB <100 Priority Rate Job Creation Initiative Retrainee Expansion Funds (Alt/Gen)		Industry Sector(s):	Construc	tion (C)
				Priority Ir	ndustry: 🛛 Yes 🗌 No
Counties Served:	Sacramento		Repeat Contractor:	🗌 Yes 🛛 No	
Union(s):	🗌 Yes 🛛 No				
Number of Employees in: CA: 61		CA: 61	U.S.:61		Worldwide: 61
Turnover Rate: 10%					
Managers/Supervisors: N/A		N/A			

# **FUNDING DETAIL**

In-Kind Contribution

\$141,110

Total ETP Funding
\$90,229

# TRAINING PLAN TABLE.

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per	Post- Retention
				Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Business Skills, Commercial Skills,	59	8-200	0-37	\$1,311	\$23.65
	SB <100 Priority Rate	Computer Skills, Continuous Impr, HazMat, OSHA 10/30, PL-Comm Skills		Weighted Avg: 57			
2	Retrainee Job Creation Initiative SB <100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, OSHA 10/30, PL-Comm Skills	8	8-200 Weighte 70	•	\$1,610	\$20.00

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1 (Retrainee): \$19.12 per hour for Sacramento County; Job Number 2 (Job Creation): \$15.65 per hour for Sacramento County. Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.

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

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

Wage Range by Occupation								
Occupation Titles	Actual Wage Range	Estimated # of Trainees						
Job Number 1 (Retrainee)								
Administrative Staff		2						
Field Crew		7						
		35						
Foremen		7						
Project Managers		3						
Shop Staff		4						
Superintendent		1						
Job Number 2 (Job Creation)								
Administrative Staff		1						
Field Crow		2						
Field Crew		2						
Project Managers		2						
Shop Staff		1						

#### INTRODUCTION

Founded in 2002 and headquartered in Rancho Cordova, Cook General Engineering, Inc. (Cook Engineering) (www.cookengineeringinc.com) performs high-precision turnkey site preparation for residential, commercial, industrial, and municipal projects throughout Northern California. Services include excavation, demolition, paving and other contracting needs. Training will be delivered at the location in Rancho Cordova. This will be Cook Engineering's first ETP Contract.

#### Veterans Program

Currently, Cook Engineering does not actively recruit Veterans, however the Company is actively looking for ways to proactively hire veterans.

## PROJECT DETAILS

Under this proposal, Cook Engineering plans to focus training on the expansion of current business processes through new projects and new equipment and technology. As a result of an expanding construction industry and COVID-19, the Company has received many big box building projects over the last year including warehouses and cold-storage facilities. This surge of projects are the result of a change in consumer patterns toward on-line/e-commerce shopping. Cook Engineering plans to deal with the increased workload by implementing new technologies in order to supplement the current workforce. These new technologies take the form of software for designing, planning, and modeling of excavation projects, as well as heavy equipment such as excavators and tractors. As a result, staff will require extensive training in order to effectively and efficiently operate the new software and heavy equipment.

In addition, Cook Engineering plans to focus a large portion of training on safety. Since a sizable portion of the Company's contracts are with PG&E, the construction staff works around power and natural gas lines as they service underground utility. As this can present a dangerous environment, Cook Engineering constantly trains on safety to ensure staff is confident as they work.

#### **Retrainee - Job Creation**

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

Cook Engineering is growing at a rapid pace, with revenues doubling within the last year. This growth is due to an increase in demand for services as companies expand warehousing and storage facilities to meet consumer online shopping demands. As a result, the Company will hire 8 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

#### Training Plan

Training will be delivered via Class/Lab, Videoconference, Computer-Based Training, Productive Lab, and E-Learning in the following:

**Business Skills**: Training will be offered to all occupations. Training will focus on customer service. Training will consist of Business Communication, Negotiating, and Strategic Planning.

**Commercial Skills**: Training will be offered to Field Crew, Foremen, Project Manager, Shop Staff, and Superintendent. Training will focus on processes necessary to complete projects. Training will consist of Demolition, Excavating, Job Hazard Analysis, and Trenching.

**Computer Skills**: Training will be offered to all occupations. Training will focus on new software that is being implemented. Training will consist of AgTek, BlueBeam, and Telematics – Topcon/Trimble.

**Continuous Improvement**: Training will be offered to all occupations. Training will focus on cross-training on processes as well as leadership and development skills. Training topics include Cross Training, Process Improvement, and Supervisor Skills.

**Hazardous Materials:** Training will be offered to Project Managers, Foremen, Field Crew, Shop Staff, and Superintendent. Training will focus on proper handling and safety when dealing with hazardous materials. Training topics include Hazardous Materials Handling, Silica Awareness, and Respirator Safety.

#### Certified Safety Training

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

#### Productive Laboratory (PL)

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

Approximately 80 hours of PL training will be delivered to the Field Crew, Foremen, and Project Managers. The trainer will demonstrate step-by-step instructions and then observe trainees perform these tasks. Training will be provided on Demolition, Equipment Operation, Excavating, Forklift, Hand Tools, and Offsite Spoils Disposal. Training will provide staff with the tools they need to complete job duties and train on PG&E's Operator Qualification Protocols. Trainees will also be knowledgeable in many skill sets that will assist them at the different job sites. Production will be impacted because an experienced staff member will be used to train and observe trainees.

The Company utilizes heavy machinery in order to install underground utility pipes. Newly hired Field Crew workers require hands on training in order to operate the machines which cannot be done in a class room setting. In addition, skills such as trenching and pipe installation needs to be done in the field so staff can learn how to avoid underground utilities. Due to these complexities and machinery that requires multiple workers to operate, Cook Engineering is requesting a 1:3 trainer-to-trainee ratio.

#### Safety Cap Waiver

The Company is implementing a new safety program, and staff must train on the new safety procedures to obtain new safety certifications that general contractors are now requiring for job sites. As a result, the Company is requesting for the 10% safety cap to be increased to 50%.

#### Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0-37 hours of CBT.

#### Commitment to Training

Cook Engineering's annual training budget is approximately \$86,321 per facility for safety and employee improvement. The Company is committed to improving performance and knowledge for all employees. 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

Cook Engineering has a structured training plan in place and is ready to start training upon project approval. The Office Manager will oversee project administration along with the Controller, who will handle training rosters and tracking performance. A third party administrator will assist with the implementation, compliance, reporting and reimbursements for the contract. Training will be provided by in-house experts and vendors as needed.

## **DEVELOPMENT SERVICES**

The Company retained Carrazco LLP, Innovative Tax Solutions in Sacramento to assist with development of this proposal for a flat fee of \$9,000.

#### **ADMINISTRATIVE SERVICES**

The Company also retained Carrazco LLP, Innovative Tax Solutions to perform administrative services for a fee not to exceed 13% of payment earned.

#### TRAINING VENDORS

To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab Hours, E-Learning, and Videoconference

8-200

#### **BUSINESS SKILLS**

- Behavior Style Strategies
- Business Communication
- Business Fundamentals
- Business Writing
- Communication Styles
- Company Culture Development
- Conflict Resolution
- Cost Control
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Dealing with Difficult People
- Develop Employee Accountability
- Employee Coaching
- Employee Engagement
- Essential Skills for New Supervisor
- Financial Analysis
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques & Strategy
- Negotiating
- Operational Skills
- Organizational Structure Development
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Relationship Building
- Retaining Customers
- Strategic Planning
- Time Management

#### COMMERCIAL SKILLS

- Backfill
- Change Order Management
- Compacting
- Compliance with Customer Safety Programs
- Compliance with Underground Service Alert (USA) Requirements
- Confined Space Work Requirements
- Defensive Driving Course
- Demolition
- Emergency Response
- Equipment Maintenance/Repair
- Equipment Operation

- Estimating
- Excavating
- Forklift Powered Industrial Truck Operators
- Grading
- Hand Tools
- Heat Illness Prevention
- Heavy Machinery
- How to Deal with Public (Public Relations)
- Injury & Illness Prevention Program
- Job Hazard Analysis
- Job Safety Analysis
- Obtaining and Processing Permits
- Offsite Spoils Disposal
- Onsite Spoils Management
- Paving
- Potholing Operations
- Production Reporting
- Project Documentation
- Proper Rigging of Equipment (Transportation)
- Purchasing Procedures
- Resource Scheduling
- Safe Work Practices
- Scheduling
- StreetPrint
- Traffic Control and Flagging Operations
- Trenching
- Underground Utility Installation
- USA Ticket Management
- Work Orders

#### **COMPUTER SKILLS**

- Adobe
- Agtek
- BlueBeam
- Docuware
- DOORS & TRUCRS Air Resource Board Program
- Dunn & Bradstreet
- Environmental Protection Agency
- Financial Management System (Foundation Software)
- Foundations
- GeoTAb GPS Tracking
- Heavy Construction System Specialist (HCSS) Aerial
- HCSS Dispatcher
- HCSS E360
- HCSS HeavyBid
- HCSS HeavyJob
- HCSS Intelligence
- HCSS Plans
- HCSS Safety
- iOS (Apple Mobile Operating Software) & iCloud

- Microsoft Office (Intermediate/Advanced)
- Microsoft Project
- Newport Group Website
- PlanGrid
- Procore
- SQL Server (Management Studio)
- Telematics Topcon/Trimble (GPS)
- Textura

#### **CONTINUOUS IMPROVEMENT**

- Change Management
- Coaching Procedures
- Communication Skills
- Creating a Quality Organization
- Cross Training
- Decision Making
- Effective Meetings for Leaders
- How to Coach and Mentor
- Leadership
- Meeting Management
- Problem Solving and Decision Making
- Process Capability
- Process Improvement
- Production Operations/Workflow
- Production Scheduling
- Project Management
- Quality Measurement Systems
- Root Cause Analysis
- Statistical Process Control
- Supervisor Skills
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Time Management
- Visual Controls

#### HAZARDOUS MATERIALS

- Bloodborne Pathogens
- COVID-19 Prevention
- Emergency Response
- Hazardous Chemical Cleaning/Handling
- Hazardous Materials Handling
- Hazardous Waste Cleaning
- Respirator Safety
- Silica Awareness
- Valley Fever

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

- OSHA 10
- OSHA 30

#### Productive Lab

0 - 80

#### **<u>COMMERCIAL SKILLS</u>** (1:3 trainer-to-trainee ratio)

- Backfill
- Compacting
- Demolition
- Equipment Maintenance/Repair
- Equipment Operation
- Excavating
- Forklift
- Grading
- Hand Tools
- Heavy Machinery
- Offsite Spoils Disposal
- Onsite Spoils Management
- Paving
- Potholing Operations
- Proper Rigging of equipment (transportation)
- Safe Work Practices
- StreetPrint
- Traffic control and flagging operations
- Trenching
- Underground Utility Installation
- Work Orders

#### **CBT Hours**

0 – 37

#### <u>OSHA 10</u>

- Caught In or Between 30 Minutes
- Cranes, Derricks, Hoists, Elevators & Conveyors 30 minutes
- Electrocution 1 hour
- Excavations 30 minutes
- Falls 1.5 hours
- Health Hazards in Construction 30 minutes
- Introduction to OSHA 1 hour
- Materials Handling, Storage, Use and Disposal 30 minutes
- Personal Protective and Lifesaving Equipment 30 minutes
- Scaffolds 30 minutes
- Stairways and Ladders 30 minutes
- Struck-By 1 hour
- Tools Hand and Power 30 minutes

#### <u>OSHA 30</u>

- Asbestos Awareness 30 minutes
- Asbestos for Supervisors 2 hours
- Caught-in or Between 1.5 hours
- Confined Spaces 30 minutes
- Cranes, Derricks, Hoists, Elevators and Conveyors 30 minutes
- Electrical Safety 2 hours

- Ergonomics 30 minutes
- Excavations 30 minutes
- Fall Prevention 1.5 hours
- Fire Protection and Prevention 30 minutes
- Foundations for Safety Leadership 2.5 hours
- Hand and Power Tool Safety 1 Hour
- Hazard Communication 30 minutes
- Hazardous Materials 30 minutes
- Health Hazards in Construction 2 hours
- Introduction to OSHA 1 hour
- Lead Awareness 30 minutes
- Lead Exposure 30 minutes
- Managing Safety and Health 2 hours
- Materials Handling, Use and Disposal 30 minutes
- Motor Vehicles 30 minutes
- Personal Protective Equipment 2 hours
- Rollover Protective Structures, Signs, Signals and Barricades 30 minutes
- Safety and Health Programs 30 minutes
- Scaffolds 30 minutes
- Silica Exposure 30 minutes
- Stairways and Ladders 1 hour
- Struck-by 1 hour
- Welding and Cutting 30 minutes

# Safety Training is capped at 50% of a trainee's total training hours. (This cap does not apply to OSHA 10/30)

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



# **EXPANSION FUNDS**

# **Training Proposal for:**

# District Council 16 Northern California Journeymen and Apprentice Training Trust Fund - Glaziers

# Contract Number: ET22-0944

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: L. Vuong

### PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Apprenticeship Priority Rate	Industry Sector(s):	Construction (C)	
	Veterans		Priority Industry: 🖂 Yes 🔲 No	
Counties		Repeat		
Served:	Statewide	Contractor:	🛛 Yes 🗌 No	
Union(s):	Yes 🗌 No Glaziers - Local	Unions No. 1	69, 718, 767, 1621 and 294	
Turnover Rate:		≤20%		
Managers/S	Supervisors: (% of total trainees)	N/A		

### FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$548,100		\$40,353 Job Number 1 - 8% Job Number 2 - 20%		\$588,453
In-Kind Contribution:	50% of	Total ETP Funding Required		Inherent

#### TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours		Average Cost per	Post- Retention	
No.			Trainees C		CBT	Trainee	Wage*	
1	Retrainee	Commercial Skils	416	8-210	0	\$1,347	\$19.12	
	Apprentice			Weighte	d Avg:			
	Priority Rate			70				
2	Retrainee	Commercial Skills	19	8-210	0	\$1,479	\$19.12	
	Apprentice			Weighte	d Avg:			
	Priority Rate			ັ 70	•			
	Veterans							

\*Post-Retention Wage is the Contractual Wage

**Minimum Wage by County:** Job Numbers 1 & 2: \$20.86 per hour for Alameda, Marin, San Mateo, Santa Clara, and San Francisco Counties; \$20.79 per hour for Contra Costa County; \$19.77 per hour for Los Angeles County; and \$19.12 per hour for all other counties CBA wages have been verified.

**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 participating employers provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation					
Occupation Titles	Actual Wage Range	Estimated # of Trainees			
Job Number 1					
Apprentice Glazier		26			
		390			
Job Number 2					
Veteran Apprentice Glazier		2			
		17			

#### INTRODUCTION

The District Council 16 Northern California Journeymen and Apprentice Training Trust Fund (DC16 NorCal JATTF) (www.dc16apprentice.org) was formed in June of 2006 between the Northern California Glass Management Association and the District Council 16 of the International Union of Painters and Allied Trades AFL-CIO. The Organization is comprised of three formerly separate training trusts that have been merged into one in order to consolidate expenses and focus revenue on training and infrastructure. DC16 NorCal JATTF covers four "master" collective bargaining agreements representing four trades: Floorcovering Installers, Painters, Glaziers, and Drywall Finishers. This is DC16 NorCal JATTF's fourth ETP Contract, and the fourth in the last five years. This proposal will only train the Glaziers (DC16 NorCal JATTF - Glaziers) trade and will be offered to employers statewide.

#### **COVID Response Exception**

California's mandated Shelter-in-Place order has required that some training be delivered via E-Learning, and in-person class sizes will be reduced to adhere to state-mandated social distancing guidelines. The Contractor will use E-Learning, Videoconference and classroom based training approved by ETP as permitted by ETP's Response to COVID-19.

#### Veterans Program

DC16 NorCal JATTF - Glaziers recruits Veterans in cooperation with Helmets to Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. The curriculum for the Veterans (Job Number 2) will be the same as Apprentice training (Job Number 1). These trainees are in a separate Job Number to better track performance toward the goal of improved outreach for Veterans. DC16 NorCal JATTF - Glaziers is committed to supporting job-related training that helps Veterans transition into the California workforce.

#### Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour. The ETP wage for Apprentices is no less than \$26.08 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

#### PROJECT DETAILS

There are currently more than 515 signatory employers and 1,200 apprentices employed and contributing to the fund. It is anticipated that an estimated 30% of the signatory employers will participate in this project, of which approximately 70% are small businesses. DC16 Nor Cal JATTF - Glaziers is constantly improving its program to ensure training is up to date with industry needs, new technologies and materials. For example, training is required on a crane with a new design that collapses and expands, allowing plate glass to move through the internal space of building, rather than moving externally. In addition, training must occur on new vapor abrasive blasting equipment, which generates less dust and uses less water than the previous model.

Glaziers need to learn to install, remove and cut glass products for both commercial and residential homes and businesses. Apprentices learn to use tools and equipment of the trade including how to handle, measure, cut, and install glass and metal framing; cut and fit moldings; and install and balance glass doors. Training will also cover blueprints and specifications for size, color, type, and thickness of glass required for the job. DC16 NorCal JATTF - Glaziers is located in San Leandro and coordinates training there and in Sacramento training center.

#### Employer Demand

New residential and commercial building construction is driving demand for workers. In addition, home improvement and remodeling projects are expected to create jobs as existing homes and commercial buildings age and need retrofitting and repair, the complexity of construction projects, and a retiring workforce. As a result, DC16 NorCal JATTF - Glaziers must train Apprentice Glaziers to meet demand. Training will prepare them to work on current projects include Carquinez Middle School, Department Veterans, Emerson Hall, Facebook MPK22, FSU Student Union, Gilead Science Inc., La Clinica, Mangini Ranch, Pilot Plant, Roblox, Sacramento and Solano Community Center, SFO Airport Terminal 1, Station 1300, and UC Davis Medical Center.

#### Training Plan

The proposed training, entirely center-based, is scheduled to begin the week following Panel approval. Training will be delivered via Class/Lab, Videoconference and E-Learning in the following:

**Commercial Skills:** Training will be offered to all Apprentices and will include Curtain Wall System, Fabrication & Layout Techniques, Hardware, Welding, and Shop Drawings Caulking & Sealants.

#### **Curriculum Development**

The training curriculum was developed by DC16 NorCal JATTF - Glaziers with input from both union and employer representatives and customized to address the needs of its members, participating employers, and the industry. Feedback comes directly from employer and union representatives based on workplace performance, as well as student course evaluations.

#### Impact/Outcome

Trainees in this project may be certified in the following: Booms and Lifts, Confined Space, Hazardous Waste Operations and Emergency Response, Flagging and Traffic Control, 24 Hour Lead, Repair, Remedial and Prevention, Swing Stage, and Rigging. All Apprentices who complete the program receive completion certificates from the Division of Apprentice Standards and the Department of Labor.

#### Commitment to Training

Each of the signatory employers contributes to the education-training fund. DC16 NorCal JATTF - Glaziers certifies that signatory employers will continue to pay into their respective trust funds for apprentice training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Training Director will oversee the project and five staff members will assist with the administration, including scheduling of training and collection of rosters. Training attendance is kept by each instructor and passed to the administrative staff at the two training sites. Strategy Workplace Communications will assist with administrative services to ensure that all training records adhere to ETP requirements.

#### Marketing and Support Costs

DC16 NorCal JATTF - Glaziers is requesting 8% in support costs for Job Number 1 and 20% support costs for Job Number 2 (Veterans) to fund marketing to employers; to recruit apprentices; and to conduct ongoing assessments of employer-specific job requirements. There are five staff people in the DC16 NorCal JATTF - Glaziers offices that will assist with the marketing, recruitment, needs assessments and scheduling of training.

DC16 NorCal JATTF - Glaziers and the various local unions will publicize the availability of training through direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. It will also promote this training program at labor-management meetings and industry assemblies; and site visits to local schools, trade shows, and vocational outreach organizations. Staff recommends the 8% and 20% supports costs.

#### **Trainer Qualifications**

There are 18 full-time trainers to provide training. These trainers are current members of the trade and are subject-matter experts.

#### **Tuition Reimbursement**

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

### ACTIVE PROJECTS

The following table summarizes performance by DC16 NorCal JATTF - Glaziers under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0912	\$296,466	08/03/20 – 08/02/22	319	TBD	TBD

Of an estimated 319 trainees, 276 have been enrolled and started training. To date, the ETP Systems show 8,296 reimbursable hours have been tracked for potential earnings of \$160,164 (54% of approved amount). DC16 NorCal JATTF - Glaziers projects final earnings of 100% based on training currently committed to by employers and in progress through May 2022.

#### PRIOR PROJECTS

The following table summarizes performance by DC16 NorCal JATTF - Glaziers under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0914	Statewide	07/30/18 – 07/29/20	\$1,755,776	\$1,755,776 (100%)
ET16-0926	Statewide	05/31/16 – 05/30/18	\$949,048	\$904,707 (95%)

### **DEVELOPMENT SERVICES**

California Labor Federation in Oakland and Strategy Workplace Communications in Alameda assisted with development at no charge.

#### **ADMINISTRATIVE SERVICES**

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

### TRAINING VENDORS

N/A

#### Exhibit B: Menu Curriculum

#### Class/Lab/Videoconference/E-Learning Hours

8-210

Trainees may receive any of the following:

#### COMMERCIAL SKILLS

- Center For Construction Research and Training
- Curtain Wall System
- Door Hardware
- Fabrication & Layout Techniques
- Finals
- First Aid/CPR
- 7-Eleven and Projects
- Floor Closer and Shower Doors
- Hardware
- Intro Solar and Energy Efficient Systems
- Intro to Solar Install & PV Systems
- Longs Drugs and Projects
- Mirrors & Shower Doors
- Putty Glazing & Scaffold
- Shop Drawings, Caulking & Sealants
- Storefront
- Transits And Levels
- Welding

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

Note: Reimbursement for retraining is capped at 210 total training hours per trainee, regardless of the method of delivery.



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

### **Training Proposal for:**

# **Global Power Group, Inc.**

### Contract Number: ET22-0159

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: J. Lima

### PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee		Industry Sector(s):	Construc	tion (C)
	Expansion Funds (Alt/Gen) Job Creation Initiative SB <100			Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	San Diego		Repeat Contractor:	☐ Yes ⊠ No	
Union(s):	🗌 Yes 🖾 No				
Number of	Number of Employees in: 0		U.S.:85		Worldwide: 85
Turnover Rate: 3%					
Managers/ (% of total tra	Supervisors: inees)	4%			

### **FUNDING DETAIL**

In-Kind Contribution

\$476,300

Total ETP Funding
\$138,000

### TRAINING PLAN TABLE

Job	Job Description		Estimated	Range of Hours		Average Cost per	Post- Retention
No.	Job Description	Type of Training	/pe of Training No. of Trainees		CBT	Trainee	Wage*
1	Retrainee	Cont. Improv.	85	8-200	0	\$1,380	\$26.08
	Priority Rate	Computer Skills		Weighte	d Avg:		
	SB <100	Comm. Skills		Ğ660			
		Business Skills PL-Comm. Skills					
2	Job Creation	Cont. Improv.	15	8-200	0	\$1,380	\$16.15
	Priority Rate SB <100	Computer Skills Comm. Skills Business Skills PL-Comm. Skills		Weighte 60	•		

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1: \$26.08 per hour for ETP Minimum Wage; Job Number 2: \$16.15 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?: Set I No Set Maybe

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occu	Wage Range by Occupation					
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1						
Customer Service		3				
		1				
Decignera		2				
Designers		1				
Drivers		4				
Drivers		1				
Managara/Suparvigara		3				
Managers/Supervisors		1				
Maintenance Staff		36				
Repair Staff		25				
Support Stoff		7				
Support Staff		1				

#### INTRODUCTION

Global Power Group, Inc. (Global Power) (<u>www.globalpowergroup.com</u>) was founded in 2018 and headquartered in San Diego County. Global Power provides generator and industrial engine

systems to supply electricity during emergency blackouts. The Company conducts a needs analysis for its customers and design a system that meets the business needs of the client. The Company provides 24-hour generator & industrial engine service and repair, 24-hour generator and power distribution rentals, 24-hour fueling services, emergency generator sales, and preventative maintenance plans. Global Power's customers include hospitals, hotels, grocery stores and other large facilities that need a reliable source of emergency power.

#### Veterans Program

The Company encourages and actively recruits veterans, but will not separate them out in this contract.

#### PROJECT DETAILS

This is Global Power's first ETP Contract. The proposed training will help the Company grow its business with the current demand for products and services. ETP Funding will allow the Company to expand its training efforts into new areas to help its trainees gain higher skill levels as well. With the growth and demand, Global Power projects to hire 15 new workers over the next two years.

#### Training Plan

**Business Skills**: Trainees under the occupation of Customer Service, Designers, Drivers, Managers/Supervisors, Maintenance Staff, Repair Staff and Support Staff will train in Business Skills.

**Commercial Skills**: Trainees under the occupation of Customer Service, Designers, Drivers, Managers/Supervisors, Maintenance Staff, Repair Staff and Support Staff will train in Commercial Skills

**Computer Skills**: Trainees under the occupation of Customer Service, Designers, Drivers, Managers/Supervisors, Maintenance Staff, Repair Staff and Support Staff will train in Computer Skills.

**Continuous Improvement**: Trainees under the occupation of Customer Service, Designers, Drivers, Managers/Supervisors, Maintenance Staff, Repair Staff and Support Staff will train in Continuous Improvement Skills.

**Productive Laboratory:** 30 trainees under the occupation of Drivers, Maintenance Staff, and Repair Staff will train in Productive Laboratory – Commercial Skills. Productive Lab training is necessary as trainees must learn how to necessary occupational skill sets. The trainer to trainee ratio will be 1:3 or less. There may be cases when instructors are not available to provide 1:1 training and the need for a 1:3 ratio is requested in order to allow the company to complete projects on time while workers are being trained.

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

#### Commitment to Training

Currently, Global Power spends \$150,000 in training annually that includes new-hire orientation, OSHA mandated training, sexual harassment training, and first aid training. The company has an on-the-job training program for commercial skills. MS Office (Basic level) is provided on an asneeded basis.

In the past, the Company has provided a new-hire orientation, mandated training, and an introductory level of commercial skilled 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 begin upon Panel approval. Global Power has designated a team of eight staff which includes a Controller, Training Coordinator, and Managers/Supervisors to oversee ETP training and administrative responsibilities. Managers/Supervisors and trainers will travel to customer locations to provide training, secure rosters, and ensure ETP compliance. The Company has also retained a third party to assist with administrative duties.

#### Impact/Outcome

Global Power is working to increase installation and delivery capacity to meet increased demand for products and services. Training the workforce on commercial skills will allow the Company to meet new customer demands.

#### **Retrainee - Job Creation**

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

The Company will hire 15 new employees (Job Number 2). Turnover Rate penalty is not assessed for job creation.

Due to power generation emergency in California the power grid cannot be relied upon to provide electric power. Demand for electricity is continuing to grow by a consistent source of power is not available. Global provides power backup systems. The business is growing and demand for products and services is increasing. The Company must hire additional workers to meet the customer demand.

#### **DEVELOPMENT SERVICES**

The Company retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of \$6,900.

#### **ADMINISTRATIVE SERVICES**

The Company retained National Training Company in Irvine 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/E-Learning Hours

8-200 Trainees may receive any of the following:

#### **CONTINUOUS IMPROVEMENT**

- Advanced Operating Procedures
- Project Management Skills
- Resolving Installation Problems
- Team Communication

#### **COMPUTER SKILLS**

- Computerized Inventory
- Internet Power Tracking
- MS Office Advanced
- Project Management Software

#### COMMERCIAL SKILLS

- Backup System Design
- Circuit Devices
- Cross Training-Electrical Systems
- Electric Facility Interface
- Emergency Power Systems
- Equipment Loading & Storage
- Equipment Problem Diagnosis
- Failure Analysis Procedures
- Fuel Systems
- Generation Equipment
- Generator Inspection
- Generator Operation
- Lighting Retrofitting
- Non-Conforming Reports
- Operating Construction Equipment
- Parts and Product Specifications
- Standard Operating Procedures

#### **BUSINESS SKILLS**

- Covid-19 Procedures
- Cost Effective Solutions
- Effective Listening Skills
- Logistics
- Parts Specifications
- Emergency Scheduling
- Problem Resolution

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

#### Productive Lab Hours (1;3 Ratio)

#### 0-100

#### **COMMERCIAL SKILLS**

- Emergency Repair Procedures
- Equipment Certification Procedures
- Equipment Maintenance Procedures
- Standard Operating Procedures
- System Installation Procedures

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. Reimbursement for new hire training is capped at 260 total training hours per trainee.



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

# **Training Proposal for:**

# **HP Hood LLC**

# Contract Number: ET22-0165

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: A. Reyes

### PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Expansion Funds (Alt/Gen) Priority Rate Veterans		Industry Sector(s):	Manufact	turing (E)
				Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	Sacramento		Repeat Contractor:	🛛 Yes 🔲 No	
Union(s):	🛛 Yes 🗌 No	Chauffeurs, Te	eamsters and	l Helpers L	ocal No. 150
Number of Employees in: CA: 336		U.S.:3000		Worldwide: 3000	
Turnover Rate: 5%					
	Managers/Supervisors: (% of total trainees)				

### **FUNDING DETAIL**

In-Kind Contribution

\$441,184

Total ETP Funding
\$292,560

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Rango Hou Class / Lab	Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, Management Skills, Manufacturing Skills, PL- Manufacturing Skills	299	8-200 Weighter 40	\$920	\$21.20
2	Retrainee Job Creation Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, Management Skills, Manufacturing Skills, PL- Manufacturing Skills	7	8-200 Weighte 40	\$920	\$21.20
3	Retrainee Priority Rate Veterans	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, Management Skills, Manufacturing Skills, PL- Manufacturing Skills	12	8-200 Weighte 40	\$920	\$24.30

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Numbers 1 (Retrainee) and 3 (Veterans): \$19.12 per hour for
Sacramento County; Job Number 2 (Job Creation): \$15.65 per hour for Sacramento County;
Health Benefits: Yes No This is employer share of cost for healthcare premiums –
medical, dental, vision.
Used to meet the Post-Retention Wage?: 🗌 Yes 🖾 No 📋 Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention
Wage.

Wage Range by Occ	upation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees					
Job Number 1 (Retrainee)							
Administrative Staff		5					
Engineering Staff		5					
IT		12					
Production Staff		15					
		140					
Quality/Lab Staff		33					
Supervisors and Managers		30					
Warehouse Staff		5					
		54					
Job Number 2 (Job C	Creation)						
Supervisors and Managers		6					
Warehouse Staff		1					
Job Number 3 (Vet	erans)						
Engineering Staff		1					
Production Staff		1					
		4					
Quality/Lab Staff		1					
Supervisors and Managers		3					
Warehouse Staff		2					

#### **INTRODUCTION**

Founded in 1846 and located in Sacramento, HP Hood LLC (HP Hood) (<u>https://hood.com</u>) manufactures dairy products including milk, cheese and creams. HP Hood's brands and franchise products include Hood, Crowley Foods, Simply Smart, Heluva Good, Lactaid, Blue Diamond Almond Breeze, Baileys Coffee Creamers, and Hershey's Milk and Milkshakes. Customers include Safeway, Walmart, Raley's, Save Mart, Nugget, Whole Foods and Target. HP Hood has three different production, distribution and service facilities in Sacramento County. All three locations will participate in training for this contract. This is HP Hood's second ETP contract and second in five years.

#### Veterans Program

HP Hood plans to train 12 Veterans (Job Number 3) who have served on active full-time duty in the Armed Forces. The Company is committed to retaining Veterans and actively recruits Veterans through Veteran's Employment Department for job fairs. In addition, HP Hood recruits Military Officers as they transition to civil life.

#### **Union Support**

Production Staff, Quality/Lab Staff, and Warehouse Staff are represented by Chauffeurs, Teamsters and Helpers Local No. 150. The union has submitted a letter of support for this training project.

#### PROJECT DETAILS

HP Hood's previous contract mainly focused on the implementation of new equipment as well as improving efficiency and productivity while maintaining Good Manufacturing Practice standards. This contract will continue to build on prior training by continuing to implement new systems and equipment for 21<sup>st</sup> century operation and efficiency.

The Company is continuing to upgrade processes and technology in order to keep pace with industry and customer demands. HP Hood has invested over \$38M on new equipment including P-12 Filler, OM6 Oat Filler, and Half Gallon 4. Implementation of the new equipment is scheduled to be completed by first quarter of 2022. This new machinery requires HP Hood to provide its workers with operational and process improvement skills to be efficient and productive.

In addition, the Company is in the process of upgrading current software. Two new software systems are scheduled to be implemented by the end of the year. These software are LITMOS and Systems, Application, and Products (SAP). These products will provide custom industry specific training modules to assist in data driven decision-making and improve production outcomes. Training will provide employees the skills needed to navigate the systems proficiently.

#### **Retrainee - Job Creation**

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

HP Hood is committed to increasing its workforce and requires additional frontline managers charged with managing production and warehouse operations in order to meet increasing demand with a goal of increasing production volume by 8% by 2023. The Company will hire 7 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

#### Training Plan

Training will be delivered via Class/Lab, Videoconference, Computer-Based Training, Productive Lab, and E-Learning in the following:

**Business Skills**: Training will be provided to all occupations in administrative efficiency and will provide staff with the skills to operate the business effectively. Training topics include Leadership Development, Customer and Project Management, and Reporting and Analysis.

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

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

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

**Management Skills:** Training will be delivered only to Managers and Supervisors. Training will focus on enhancing skills to create a productive work atmosphere to motivate and lead staff. Training topics include Leaders in Training Program and Production Management.

**Manufacturing Skills:** Training will be provided to Production, Warehouse, and Quality/Lab Staff. Trainees will gain skills and knowledge to operate and maintain new and old production equipment to ensure product quality. Training topics include Carton Integrity Training, Electrical Training, and Safe Quality Food (SQF) Standards.

#### Certified Safety Training

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

#### Productive Laboratory (PL)

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

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

Training will be under constant supervision with a 1:3 trainer-to-trainee ratio. Production is expected to be slowed during PL as the trainer will be stopping production to coach and mentor the trainees. Also, the equipment will be operating at a slower speed until proficiency is gained. The trainer will determine the trainee's level of competency at the end of the training. PL training will be capped at 60 hours per trainee.

#### Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0-10 hours of CBT.

#### **Temporary to Permanent Hiring**

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

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

#### Commitment to Training

HP Hood has an annual training budget of approximately \$74,000 per facility in state-mandated safety training, and manual processes.

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

HP Hood has a structured training plan in place and is ready to start training upon project approval. The Senior Director of Operations and the Senior Manager of Human Resources will oversee project administration along with the Training Manager and Human Resources Coordinator, who will handle training rosters and tracking performance. Additionally, the Company has retained the services of a third party administrator to oversee all administrative responsibilities, including enrollment, recording, tracking, scheduling training, securing ETP rosters, verify training and retention completion and ensure compliance with all ETP requirements.

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

#### PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET18-0205	Sacramento	6/4/2018- 6/3/2020	\$183,760	\$183,760 (100%)

### **DEVELOPMENT SERVICES**

Economic Incentives Advisory Group (EIAG) in Phoenix, Arizona assisted with development for a flat fee of \$15,000.

### **ADMINISTRATIVE SERVICES**

EIAG will also perform administrative services for a fee not to exceed 12% of payment earned.

#### **TRAINING VENDORS**

To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning/Video Conferencing Hours

8-200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Customer and Project Management
- Human Resources Best Practices
- Leadership Development
- Reporting and Analysis

#### **COMPUTER SKILLS**

- LITMOS
- Microsoft Office (Intermediate and Advanced)
- New Equipment Controls
- Systems, Applications & Products (SAP)

#### CONTINUOUS IMPROVEMENT

- Process Improvement
- Quality Plan

#### HAZARDOUS MATERIALS

- Ammonia Awareness
- Chemical Safety
- Hazardous Communication

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

- OSHA 10
- OSHA 30

#### MANAGEMENT SKILLS (management trainees only)

- Leaders in Training Program
- Production Management

#### MANUFACTURING SKILLS

- Aerial Lift / Boom Lift / Scissor Lift
- Biosecurity and Food Defense
- Carton Integrity Training
- Clamp Training
- COVID-19 Practices
- Critical Control Point (CCP) Training
- CSE Training
- Electrical Training
- Ethical Sourcing
- Filler Training
- Food Allergens
- Fork Lift
- Good Manufacturing Practices
- Hazard Analysis and Risk-based Preventive Controls (HARPC) Training

- Hot Work
- Injury and Illness Prevention Program
- Inventory
- Lab Training
- Laser
- New Equipment and Equipment Changes/Updates
- Respiratory Training
- Safe Quality Food (SQF) Standards
- Sanitation Bootcamp
- Shipping / Receiving Training
- Stormwater Pollution Prevention Plan (SWPPP) Training
- Traceability

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

#### PL Hours

0 – 60

#### MANUFACTURING SKILLS (1:3 trainer-to-trainee ratio)

- Bulk Chemical Receiving
- Carton Integrity Training
- Forklift Training
- Lab Training
- Operator Training
- Sanitation Bootcamp

#### **CBT Hours**

0 – 10

#### MANUFACTURING SKILLS

- California COVID Safety at Work- 15 Min
- Alcohol and Drug Awareness for Managers 15 Min
- Reducing the Spread of Infection 15 Min
- Hearing Conservation 15 Min
- Chemical Safety 15 Min
- Lockout Tagout 15 Min
- Working in Hot and Cold Conditions 20 Min
- PPE Awareness 15 Min
- Slips and Trips 15 Min
- Forklift Safety 25 Min
- Forklift Training 15 Min
- Manual Handling 15 Min
- Fall Protection 20 Min
- Fire Safety and Prevention 25 Min
- Health Hazards at Work Trauma and Exposures 15 Min
- Driver Safety Awareness 30 Min
- Bloodborne Pathogens 25 Min
- Staying Safe in the Workplace 30 Min
- Hand Hygiene 15 Min

#### MANAGEMENT SKILLS

- Sustaining a Winning Culture 15 Min
- The Heart of a Leader 15 Min
- Benefits of Meetings 15 Min
- The Cross Purpose Trap 15 Min
- It All Starts with Character 15 Min
- The Buck Stops Here 15 Min
- Knowing What You Don't Know 15 Min
- Inspirational Leadership 20 Min
- SMART Objectives 20 Min
- What Managers Need to Know about Managing Change 30 Min
- Managing Change 15 Min
- Effective Delegation 15 Min
- The Team and Its Members 15 Min
- The Team and the Organization 15 Min
- Key Tools and Knowledge for Team Leading 15 Min

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



# CHAUFFEURS, TEAMSTERS AND HELPERS

LOCAL NO. 150 7120 EAST PARKWAY – SACRAMENTO, CALIFORNIA 95823 TELEPHONE (916) 392-7070 FAX 392-7675 EMAIL teamsters@teamsters150.org

a 26

AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS

September 15, 2021

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand HP HOOD LLC is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project:

• Approximately 232 Production, Lab and Warehouse Workers

### EXHIBIT E

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincere 9-15-21

Doug Secord Business Representative

DS/tc



# **EXPANSION FUNDS**

# **Training Proposal for:**

# Intuitive Surgical, Inc.

# Contract Number: ET22-0144

Panel Meeting of: November 19, 2021

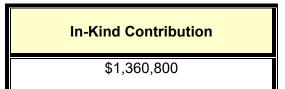
ETP Regional Office: San Francisco Bay Area

Analyst: S. Wang

### PROJECT PROFILE

Contract Attributes:	Retrainee <sup>:</sup> Priority Rate Expansion Funds (Alt/Gen)		Industry Sector(s):	Manufacturing (E) Professional, Scientific Technology (		
				Priority Ir	ndustry: 🛛Yes 🔲No	
Counties Served:	Santa Clara		Repeat Contractor:	🛛 Yes 🗌 No		
Union(s):	🗌 Yes 🛛 No					
Number of Employees in:		CA: 3,784	U.S.: 5,714		Worldwide: 8,571	
<u>Turnover Rate</u> :		1%				
Managers/Supervisors: (% of total trainees)		5%				

### **FUNDING DETAIL**



Total ETP Funding	
\$496,800	

### TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours		Average Cost per	Post- Retention
No.		Type of Training	Trainees	Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Business Skills,	900	8–200	0	\$552	\$21.00
	Priority Rate	Computer Skills, Cont. Improv., Mfg. Skills, PL- Mfg. Skills		Weighte 24	•		

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: \$20.86 per hour for Santa Clara County. Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.

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

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

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Engineering/Quality/Research and Development Staff		215				
Information Technology Staff		100				
Manufacturing / Logistic Staff		25				
		75				
Marketing / Sales Staff		90				
Operations Support Staff		20				
		100				
Supervisors / Managers		50				
Technician / Service Staff		225				

#### INTRODUCTION

Founded in 1995 and headquartered in Sunnyvale, Intuitive Surgical, Inc. (Intuitive) (<u>www.intuitivesurgical.com</u>) with its affiliate- Intuitive Surgical Operations, Inc. (ISOI) manufactures surgical robots used across cardiac, urology, gynecologic, colorectal, pediatric, and general surgical disciplines. Intuitive is the parent company that primarily focuses on sales/marketing, and its subsidiary- ISOI primarily focuses on manufacturing. Intuitive has locations in Georgia, Mississippi, Virginia, Connecticut, North Carolina, Mexico, Switzerland, Germany, Korea, India, and Japan. ETP-funded training will be delivered to employees at its Sunnyvale headquarters.

Intuitive has four generations of the da Vinci® Surgical System: the Xi, Si, S and standard used in general laparoscopic surgery. Hospitals worldwide use the da Vinci® system to perform minimally invasive surgery, which reduces incidence of complications, post-operative recovery time and length of hospital stay. Intuitive is advancing this system's new platforms—imaging, advanced instruments, da Vinci® SP, and its diagnostic platform.

#### Veterans Program

While Intuitive is not including a Veteran component in the project, it has developed specific outreach to the veteran population. The Company has created a veteran-specific microsite to educate about Intuitive positions available to veterans that fit their backgrounds (https://careers.intuitive.com/us/en/veterans).

Additionally, the Company is working on developing and promoting that page thru a veteran job board called JobPath, which will create more visibility to the open positions. Intuitive also conducts career fairs with Cameron Brooks (a military specific recruiting company), and it has hired multiple employees thru this relationship. Intuitive finds that veterans bring a unique set of skills and have the sense of commitment, teamwork, and self-confidence it takes to work in the Company's competitive environment.

### PROJECT DETAILS

This is Intuitive's third ETP Contract, and its third in the last five years. Previous training focused on emerging technologies, engineering design, and development of new products/technologies such as Intuitive's next-generation robotics, 3D vision, SureForm 60TM stapler and SmartFireTM technology, and its newly FDA approved da Vinci® SP for urologic procedures. This proposal will focus on meeting recent market demands as well as launching its three new products- SimNow, Ion Endoluminal System, and Iris. Even though some of the training courses listed in the proposed curriculum are the same, coursework under the prior Contract will not be duplicated.

Training for this proposal will focus on the competitive market demand for surgical robots. The market anticipates to grow with a robust compound annual growth rate (CAGR) of 10.2% during 2021–2031. The market for surgical robotics generated \$5.46 billion in 2020 and is estimated to reach \$16.77 billion by 2031. This ongoing trend of rising demand for surgical robotic systems is anticipated to continue in the future with the implementation of technological innovations and advancements in minimally invasive surgical (MIS) procedures. MIS within the healthcare sector is considered as the best treatment alternative for open surgery.

To continue to grow and stay current with advances in technology, Intuitive has launched the following three new products:

- SimNow The latest generation simulator that is cloud-enabled and allows surgeons to learn and practice their surgical skills and allows for real-time simulation performance tracking for surgeons and administrators.
- Ion Endoluminal System A flexible, robotic-assisted, catheter-based platform designed for minimally invasive biopsy in the lungs. The system provides real-time vision of the airway throughout navigation and calculates the shape of the catheter hundreds of times per second.
- Iris An augmented reality imaging product for use in kidney procedures. This product extracts CT scans, runs them through machine-learning algorithms, and returns a segmented three dimensional model of the kidney for use in planning for a procedure with intraoperative visualization of the area.

#### Training Plan

Trainees will receive training via Class/Lab/E-Learning and Productive Lab (PL) in the following:

**Business Skills**: this training will be offered to all occupations in courses such as Business Process Skills, Communication / Teambuilding Skills, and New / Upgraded Product Skills. Staff will be able to perform their job functions efficiently in the Intuitive environment.

**Computer Skills**: this training will be offered to all occupations in courses such as Agile Software Skills, Change Order System Skills, and Computer-Aided Engineering and Design Tools to ensure staff know how to operate their daily job functions.

**Continuous Improvement**: this training will be offered to all occupations in courses such as Leadership / Coaching Skills, Statistical Process Control Skills, and Project / Program Management Skills. This will provide an overview of Intuitive's operation model as well as the skills and proficiency necessary for high-level efficiency, quality, and customer service.

**Manufacturing Skills**: this training will be offered to Engineering/Quality/Research and Development Staff, Manufacturing / Logistics Staff, and Technician / Service Staff in courses such as Geometric Dimensioning and Tolerancing (GD&T), Clinical Product Skills, New / Updated Manufacturing Processes / Systems / Products, and Root Cause Analysis / Corrective Action.

#### Productive Laboratory (PL)

Trainees may produce goods for profit as part of the PL training. Intuitive has identified approximately 250 staff for PL- Manufacturing Skills training in the following occupations: Engineering/Quality/Research & Development Staff, Manufacturing/Logistics Staff, and Technician/Service Staff. The Company is requesting approximately 60 hours of PL training per trainee. However, it anticipates only 10–15 percent of its workforce will need more than 40 hours of PL training. Even though the majority of PL is delivered on a 1:1 trainer-to-trainee ratio, Intuitive requests a 1:2 trainer-to-trainee ratio. There are certain circumstances when a trainer is going over a specific process on the robotic equipment/technology and may need to provide training in a 1:2 ratio environment to bring the staff up to speed quickly to perform their particular job function.

#### Temporary to Permanent Hiring

Intuitive will train 100 workers under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for "converting" temporary workers into full-time permanent employment is three months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums upon hire into full-time permanent employment.

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

#### **Commitment to Training**

Intuitive's training budget in California for 2021 is approximately \$1 million. The Company currently provides new hire orientation, sexual harassment avoidance training, and Code of Conduct training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### Training Infrastructure

The Company's Sr. Manager, Global Talent Development (dedicated administrator) will oversee all administration. Intuitive has also identified two Administrative Staff who will assist with project management. Training will be delivered by approximately 30 in-house trainers who are subjectmatter experts, and outside vendors will be retained as needed. The Company retained a thirdparty subcontractor, Training Funding Partners (TFP), to assist with ETP administrative duties.

#### Impact/Outcome

Certifications are available for a wide variety of manufacturing assemblies, processes, and procedures.

#### Electronic Recordkeeping/LMS

Staff has reviewed and approved the Company's Learning Management System (LMS).

#### PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0235	Sunnyvale	10/8/18 – 1/7/21	\$569,504	\$569,504 (100%)
ET17-0118	Sunnyvale	7/11/16 – 7/10/18	\$477,176	\$477,176 (100%)

#### **DEVELOPMENT SERVICES**

Intuitive retained TFP in Huntington Beach to assist with development of this proposal for a flat fee of \$5,000.

#### ADMINISTRATIVE SERVICES

The Company also retained TFP to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

#### TRAINING VENDORS

To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8–200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Business Process Skills
- Communication / Team Building Skills
- Customer Service / Support Skills
- International Markets / Sales Skills
- New / Upgraded Product Skills
- Time Management
- Train-The-Trainer Skills

#### **COMPUTER SKILLS**

- Agile Software Skills
- Change Order System Skills
- Computer-Aided Engineering And Design Tools
- Intermediate / Advanced Microsoft Office Skills
- Intuitive Proprietary Systems Skills

#### CONTINUOUS IMPROVEMENT SKILLS

- Change Management Skills
- Leadership / Coaching Skills
- Performance Improvement / Management
- Process Improvement / Reengineering Skills
- Project / Program Management Skills
- Quality Assurance / Quality Control
- Statistical Process Control Skills
- Strategic Thinking
- Team Building Skills
- Troubleshooting

#### MANUFACTURING SKILLS

- Change Order Process Skills
- Clinical Product Skills
- Geometric Dimensioning And Tolerancing (GD&T)
- Good Documentation Practices / Good Manufacturing Practices
- New / Updated Manufacturing Processes / Systems / Products
- Production / Equipment Operations And Maintenance
- Root Cause Analysis / Corrective Action
- Technician Product Certification

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

#### Productive Lab (PL) Hours

0–60

#### **MANUFACTURING SKILLS** (1:2 trainer-to-trainee ratio)

- New / Updated Manufacturing Processes/Systems/Products
- Production/Equipment Operations And Maintenance
- Technician Product Certification

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



**EXPANSION FUNDS** 

# **Retrainee-Job Creation**

# **Training Proposal for:**

# Lam Research Corporation

# Contract Number: ET22-0153

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: S. Phillips

### PROJECT PROFILE

Contract	Retrainee		Industry	Manufac	turing (E)
Attributes:	Priority Rate		Sector(s):		5()
	Job Creation In	itiative			
	Veterans				
	Expansion Fund	ds (Alt/Gen)			
				Priority Ir	ndustry: 🛛 Yes 🗌 No
Counties Served:	Alameda		Repeat Contractor:	⊠ Yes □ No	
Union(s):	🗌 Yes 🛛 No				
Number of Employees in: CA: 3,64		CA: 3,648	U.S.:6,430		Worldwide: 10,950
Turnover Rate: 8%		8%			
Managers/Supervisors: (% of total trainees)		9%			

### FUNDING DETAIL

In-Kind Contribution \$1,250,000

Total ETP Funding	
\$494,500	

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per	Post- Retention
				Class / Lab	СВТ	Trainee	Wage*
1	Retrainee	Computer Skills,	225	8-200	0-40	\$1,380	\$27.16
	Priority Rate	Manufacturing Skills, Continuous Impr, HAZMAT		Weighted Avg: 60			
2	Job Creation	Computer Skills,	75	8-200	0-40	\$1,840	\$25.46
	Priority Rate	Manufacturing Skills, Continuous Impr, HAZMAT		Weighted Avg: 80			
3	Retrainee	Computer Skills,	50	8-200	0-40	\$920	\$27.16
	Veterans Priority Rate	Manufacturing Skills, Continuous Impr, HAZMAT		Weighted Avg: 40			

Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Alameda County: Job Numbers 1 & 3 - \$20.86 per hour and Job Number 2 - \$17.39 per hour. **Health Benefits:** Yes No This is employer share of cost for healthcare premiums –

medical, dental, vision.

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

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

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1 - Retrainees						
Administrators		25				
Technicians		75				
Engineers		100				
Scientists		25				
Job Number 2 – Job Creation						
Administrators		5				
Technicians		20				
Engineers		45				
Scientists		5				
Job Number 3 - Veterans						
Administrators		5				
Technicians		10				
Engineers		30				
Scientists		5				

#### **INTRODUCTION**

Founded in 1980 and headquartered in Fremont, Lam Research Corporation (Lam Corp) (<u>www.lamresearch.com</u>) designs, manufactures, markets, and services semiconductor processing equipment used in the fabrication of integrated circuits. Lam Corp's (wafer fabrication) equipment, products, and services are designed to help computer-chip makers build smaller, faster, and better-performing products to be used in a variety of electronics including: mobile phones, personal computers, servers, wearables, automotive devices, storage devices, and networking equipment. The Company's customer base includes Samsung, Intel, TSMC, and Toshiba.

#### Veterans Program

In this proposal, Lam has included a Veterans' Job Number (Job Number 3). The Company is committed to training 50 veterans over a two year period. Lam Corp uses a recruitment firm, Orion Talent, who maintains a web portal for veterans guaranteeing easy access to job opportunities. This recruitment tool shows how experiences in the military translate into careers at Lam. The Company has also committed staff resources to recruit, hire, and train veterans.

#### PROJECT DETAILS

This is Lam Corp's ninth ETP project; the fourth in the last five years. In this proposal, Lam Corp will train both incumbent and newly hired, frontline workers at both its Fremont and Livermore facilities with focuses in developing and producing new products to meet customer demands. ETP-funded training will be delivered to employees that did not participate in the prior project. Training will not be duplicated.

Technological advancements require major improvements in the performance per watt of computing. Semiconductor manufacturing has become more complex. Also, Lam Corp is developing competencies in nanoscale applications to assist its customers build smaller, faster and better performing devices. Therefore, to make innovations a reality, the Company must rely on a highly trained, skilled, and innovative workforce. Thus, training will focus on innovative and structured courses to improve technical knowledge and productivity. The training plan has also been designed to address the knowledge gap between experienced engineers and newly hired engineers and technicians.

Additionally, Lam Corp is experiencing business capacity growth and expanding its customer base by making technology and capacity investments in 3D-device scaling, multiple patterning process flow, and advanced packaging/chip integration. Training in these new technologies, facility upgrades/expansions, and other significant capital investments will support the Company's efforts to expand and stay competitive by solidifying its standing in the global marketplace.

#### **Retrainee - Job Creation**

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

Lam Corp is expanding business capacity by investing in expansion and upgrade of laboratory space and production facilities. The Company also purchased new equipment. These investments will require the hiring of 75 new employees (Job Number 2) over a two year period. These trainees will receive the same training as retrainees and veterans.

### Training Plan

The following training will be delivered via Class/Lab, E-Learning, and Computer-Based Training (CBT) by in-house subject-matter experts and vendors, if necessary:

**Computer Skills**: Training will be provided to all occupations in Advanced Desktop Productivity Applications, Advanced eBusiness Applications, Advanced Manufacturing Control Systems, and Advanced Manufacturing Lab Applications.

**Continuous Improvement:** Training will be provided to all occupations covering all aspects of quality improvement and customer relations. Courses will include Advanced Project Management, Design Tools and Practices, Design for Excellence and Leadership/Coaching Skills.

**Manufacturing Skills:** Training will be provided to all occupations covering all aspects of quality improvement and customer relations. Courses will include Application Engineering Services, Electrophoresis Analysis Equipment, Lab Automation and Robotics, Physical Vapor Depositions (PVD), Physics of Radiofrequency Plasmas, Rapid Thermal Processing (RTP), Space Plasma Thrusters and Thin Film Surface/Interaction Overview.

### Certified Safety Training

<u>Hazardous Materials (HAZMAT)</u>. This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, engineers and technicians will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entities include ISO 14001, 45001, SEMI Global Care, LAM Environmental Health & Safety Systems, and Occupational Health and Assessment Series 18001.

### Nanotechnology

A primary driver of technology in the semiconductor industry has been to shrink the lithography that prints the circuit design on semiconductor chips. New materials with precise control at the atomic scale are just one focus of development for Lam to meet these evolving customer requirements. Lam Corp also continues to develop competencies in nanoscale-applications enablement for building smaller, faster and better performing devices.

### Commitment to Training

ETP funds will not displace Lam Corp's existing financial commitment to training. The Company's statewide training expenditures is in excess of \$2,800,000. The ETP curriculum will build on (not overlap) training already being provided. Lam funds the following: all orientation and basic job-skills training; class/lab and OJT (manufacturing-skills) training; OSHA and FDA-mandated safety regulations; desktop and basic computer training; and web-based learning in leadership development, compliance, human resources, and legal and business skills. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

Lam's Director of Global Learning (dedicated administrator) will oversee ETP training. The HR department will oversee all workforce training across the organization. Additionally, there will be several full-time administration training staff and one management employee assigned to assist with administration and coordination for this project. The Company has also retained a third-party subcontractor, Herrera & Company, to assist with administration.

#### Impact/Outcome

The manufacturing skills and certifications attained by trainees who successfully complete AT courses include certificates in proprietary (computer-software) systems, geometric-tolerancing courses, and other AT topics- epitaxy, ion implantation, oxidation, rapid thermal processing (RTP), physical vapor deposition (CVD), informatics, lab automation and robotics, and vacuum technology. Additionally, HAZMAT and Lean Six Sigma (Green Belt) certifications will be attained following the delivery of ETP-funded training.

#### Electronic Recordkeeping/LMS

Staff has reviewed and approved the Company's Learning Management System.

#### PRIOR PROJECTS

The following table summarizes Contractor's performance under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%	
ET20-0159	Fremont	10/07/2019- 10/06/2021	\$562,350	\$562,350 (100%)	
ET18-0175	Fremont, Livermore	04/03/2018- 04/02/2020	\$49,680	\$49,680 (100%)	
ET16-0304	Fremont, Livermore	12/14/2015- 12/13/2017	\$48,816	\$39,519 (81%)	

### **DEVELOPMENT SERVICES**

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

### **ADMINISTRATIVE SERVICES**

The Company also retained Herrera & Company to perform administrative services in connection with this proposal for an amount not to exceed 13% of payment earned.

### **TRAINING VENDORS**

To Be Determined

### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200

Trainees may receive any of the following:

### MANUFACTURING SKILLS

- Application Engineering Services
- Electrophoresis Analysis Equipment
- ↓ Electromagnetic Properties, Waves, and Dielectric Constants
- ♣ Lab Automation and Robotics
- Physical Vapor Deposition (PVD)
- Physics of Radiofrequency Plasmas
- Rapid Thermal Processing (RTP)
- Space Plasma Thrusters
- System Data Modeling and Architecture
- Thin Film Surface/Interaction Overview

### COMPUTER SKILLS

- Advanced Desktop Productivity Applications
- Advanced eBusiness Applications
- Advanced Manufacturing Control Systems
- Advanced Manufacturing Lab Applications
- Advanced Manufacturing Control System

#### CONTINUOUS IMPROVEMENT SKILLS

- Advanced Project Management
- Design Tools and Practices
- Design for Excellence
- Leadership / Coaching Skills

### HAZARDOUS MATERIALS

- **4** Restricting of Hazardous Substances
- **k** Risk Management and Waste Management

### **CBT Hours**

0-40

### **COMPUTER SKILLS**

- Advanced Project Management Software (6 hrs.)
- Computer Assisted Design (8 hrs.)
- 🖊 Database Design (4 hrs.)
- Electronic Record Management (1.5 hrs.)
- Manufacturing Resources Planning (5.5 hrs.)

### **CONTINUOUS IMPROVEMENT**

- Advanced Customer Communications and Awareness (.5 hrs.)
- Leadership/Coaching Skills (1 hr.)
- Marketing Promotion and Strategy (12 hrs.)
- Multi-Cultural Customer Service Relationships (2 hrs.)
- Process Improvement Training (16 hrs.)
- Problem Solving Tools and Techniques (3.5 hrs.)

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



**EXPANSION FUNDS** 

## **Training Proposal for:**

# Lockheed Martin Corporation

## Contract Number: ET22-0151

Panel Meeting of: November 19, 2021

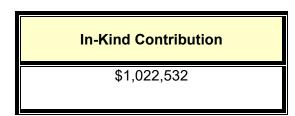
ETP Regional Office: North Hollywood

Analyst: M. Paccerelli

### PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA Expansion Funds (Alt/Gen)		Industry Sector(s):	Manufacturing (E) Aerospace Related Priority Industry: ⊠Yes  □No	
Counties Served:	Kern, Santa Cru Angeles, Santa		Repeat Contractor:		
Union(s): 🛛 Yes 🗌 No Inte		International A	ssoc. of Mac	hinists & A	Aerospace Workers District 725
Number of Employees in: CA: 9,669		CA: 9,669	U.S.: 106,0	00	Worldwide: 114,000
Turnover Rate: 6%		6%			
Managers/Supervisors: (% of total trainees)		11%			

### **FUNDING DETAIL**



Total ETP Funding	
\$499,744	

### **TRAINING PLAN TABLE**

Job	Job Description		Estimated No. of	Rang Hou	Averade		Retention
No.		Trainees	Class / Lab	СВТ	Trainee		
1	Retrainee	Business Skills,	776	8-200	0	\$644	\$20.25
	Priority Rate	Computer Skills, Continuous Imp., Mfg. Skills		Weightee 28	•		

Minimum Wage by County: \$20.86 per hour for Santa Clara County, \$19.77 per hour for Los
Angeles County, and \$19.12 per hour for Kern and Santa Cruz 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 \$0.61 per hour may be used to meet the Post-Retention Wage in Job Number 1

Wage Range by Occu	ipation	
Occupation Titles	Post-Retention Wage Range	Estimated # of Trainees
Production Worker		20
		226
Einanaa & Businaaa Operationa Staff		5
Finance & Business Operations Staff		70
Engineer		420
Manager		35

### INTRODUCTION

Founded in 1925, Lockheed Martin Corporation (Lockheed) (www.lockheedmartin.com) designs, develops, and manufactures missile and aerospace transportation systems. Lockheed is headquartered in Bethesda, Maryland with 385 locations worldwide. In this proposal, training will be provided to 776 California workers of its two divisions: Lockheed Martin Aeronautics Co (LM Aero) in Palmdale and Edwards AFB, and Lockheed Martin Space Systems Co. (LM Space) in Sunnyvale, Palo Alto and Santa Cruz.

LM Aero provides research, design, development, manufacturing, integration, sustainability, support, and upgrade of military aircraft, including combat and air mobility aircraft, unmanned air vehicles, and related technologies. Major programs include F-35 Lightning II Joint Strike Fighter; F-22 Raptor (5th generation stealth fighter); C-130 Hercules (tactical airlifter); and F-16 Fighting Falcon (multi-role fighter).

LM Space provides research, design, development, engineering and production of satellites, space transportation systems, and strategic, advanced strike, and defensive systems. It provides networkenabled situational awareness and integrates complex space and ground global systems to help its customers gather, analyze and securely distribute critical intelligence data. It is also responsible for various classified systems and services in support of vital national security systems.

In California, it currently serves as the prime contractor and systems integrator on a number of critical strategic programs such as:

- Space-Based Infrared System provides the nation with enhanced worldwide missile launch detection and tracking capabilities;
- Hypersonics include several programs with the U.S. Army and U.S. Navy to design, develop and build hypersonic strike weapon;
- Advanced Extremely High Frequency (AEHF) system Department of Defense's next generation of highly secure communications satellites; and
- Trident II D5 Fleet Ballistic Missile (FBM) a program with the U.S. Navy for the only submarine-launched intercontinental ballistic missile currently in production in the U.S.

### Union Support

Production Workers are represented by the International Association of Machinist and Aerospace Workers, District Lodge 725. The union has submitted a letter of support for this training project.

#### Veterans Program

Although there is no Veteran component in this proposal, Lockheed is firmly committed to the hiring and development of Veterans. During its most recent ETP Contract, approximately 20% of trainees were Veterans and similar percentage is anticipated in this proposal. Lockheed has internal recruiters solely dedicated to recruiting Veterans transitioning from service and value the commitment and dedication these Veterans bring to its diversified workforce.

### PROJECT DETAILS

This will be Lockheed's ninth ETP Contract, and the fourth within the last five years. This proposal will build upon its recent ETP Contract which only trained a very small percentage of its California workers. Training will target California workers who were not trained in Lockheed's prior ETP contracts.

The proposed training will be new or updated curriculum topics from the prior ETP Contracts. The Aeronautics division is involved in Advanced Development Programs (ADP) incorporating innovative design and rapid prototype applications. The ADP organization, also known as Skunk Works, is focused on future systems, including unmanned and manned aerial systems and next generation capabilities for hypersonic, intelligence, surveillance, reconnaissance, situational awareness, and air mobility. This ADP organization also continues to explore technology advancement and insertion into existing aircraft.

With these primary ADP activities, Lockheed has recently secured a number of classified contracts that continue to drive training needs in various new technologies. In the Space division, its multibillion dollar programs require training in emerging technologies and quality control methodologies in order to meet customer requirements.

### Training Plan

**Business Skills**: Training will be offered to Engineers, Finance and Business Operations Staff, and Managers with emphasis on business acumen, estimating and cost management, and finance. Trainees will learn to perform business-related tasks with greater efficiency and interact more effectively with internal and external customers.

**Computer Skills**: Training will be offered to all occupations in skills necessary to support Lockheed's cybersecurity system, programming and network administration. Trainees will learn to effectively use its highly technical automated systems to provide efficient customer services and tools to effectively perform job functions.

**Continuous Improvement**: Training will be offered to all occupations and focus on control account management, program management and earned value management. This training will help establish a culture of continuous improvement work effectively within teams and the organization.

**Manufacturing Skills**: Training will be offered to Production Workers in automation, composites, electrical systems, robotics, and structures assembly. Trainees will gain skills and knowledge to secure certification, ensure competence, and effectively perform manufacturing requirements.

#### High Unemployment Area

Some trainees in Job Number 1 work in High Unemployment Areas (HUA), a region with unemployment exceeding the state average by at least 25%. The Lockheed locations in Edwards AFB (Kern County) and Palmdale (Los Angeles County) are in HUA. However, the Company is not requesting wage modification.

#### Impact/Outcome

All proposed training will result in company-recognized and/or industry-recognized credentials. Many of Lockheed's customer contracts require formal certification of employees on specific production processes prior to performing the specific production tasks such as NASA Cable Harness, NASA Polymerics, and various Structures Assembly CERTs and QUALs.

For Computer skills training with focus on cybersecurity, engineers will receive certifications in Certified Information Systems Security Professional, CompTIA Security+ Certification and Certified Ethical Hacker. For Business Skills and Continuous Improvement regimen of courses, completion of training will lead to widely recognized credentials in topics such as Control Account Management, Earned Value Management, Problem Solving Methodologies, Finance, and Business Acumen skills.

### Learning Management System

Lockheed uses Atlas Learning Management System (LMS) to manage all training hours for employees. The system meets all ETP requirements and has been approved by staff to be used for ETP recordkeeping.

### Commitment to Training

Lockheed spends approximately \$38 million annually on training in California. Training includes all mandatory training such as OSHA, sexual harassment prevention, diversity, compliance, security practices, as well as job-specific technical training and other soft skill topics. This budget also covers expenses associated with the above-mentioned training such as salaries of internal trainers and training support staff, curriculum development, specialized training equipment for virtual delivery, etc.

ETP funds will not displace the existing financial commitment to training, instead it will allow training to expand to larger populations than would occur without the funding. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

Lockheed's Economic Development Lead will oversee all aspects at all California locations. There will be designated Talent & Organizational Capability personnel at each location to effectively administer the project. They work directly with functional department personnel to identify and prioritize training needs, enroll trainees, and fully support each training activity.

As a repeat ETP Contractor, Lockheed has established a robust system for administering its contracts. The LMS is leveraged throughout the full cycle of the training process from trainee enrollment through completion and documentation. An outside administrative consultant has been retained to assist with administrative duties and ensure that all training records meet ETP compliance.

Lockheed has a detailed training schedule in place and is ready to begin training following Panel approval. Training will be delivered by in-house experts and a training vendor in specialized training in 3DEXPERIENCE and CATIA.

### PRIOR PROJECTS

The following table summarizes Contractor's performance under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term Approved Amount		Payment Earned \$%	
ET20-0174	Palmdale, Edwards AFB, Santa Cruz, Sunnyvale, Palo Alto	11/04/19 - 11/03/21	\$649,888	\$649,750 (99%)	
18CS-0109	Palmdale	11/06/17 - 11/05/19	\$400,602	\$400,602 (100%)	
ET16-0227	Sunnyvale	11/09/15 - 11/08/17	\$748,880	\$509,221 (68%)*	

\*ET16-0227 - Lockheed's low contract performance was due to unforeseen operational changes and increased project workload, which shifted focus from training to operations. Lockheed has since stabilized its business and training has been implemented at full capacity as shown in their most recent contracts.

#### DEVELOPMENT SERVICES

Marquis Group in Volente, Texas assisted with development for a flat fee of \$31,000.

#### ADMINISTRATIVE SERVICES

The Marquis Group will also perform administrative services for a fee not to exceed 13% of payment earned.

#### TRAINING VENDORS

Dassault Systemes in Woodland Hills will provide Computer Skills training for approximately \$50,000.

### Exhibit B: Menu Curriculum

#### Class/Lab Hours

8-200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Business Acumen, Capture & Development
- Estimating & Cost Management
- Finance

### **COMPUTER SKILLS**

- 3DEXPERIENCE
- Agile/SAFe
- CATIA
- Cybersecurity
- Programming Languages
- Design, Analysis & Testing Tools
- Information Technology Platforms
- Systems & Software Engineering

### **CONTINUOUS IMPROVEMENT**

- Advanced Aeronautics
- Control Account Management
- Earned Value Management
- Leadership Development
- Manufacturing Quality
- Problem Solving Methodologies
- Program Management
- Subcontract Management

### **MANUFACTURING SKILLS**

- Automation
- Composites
- Electrical Systems
- Paint and Coatings
- Robotics
- Soldering
- Structures Assembly

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.



International Association of Machinists and Aerospace Workers

655 Vaqueros Avenue, Sunnyvale, CA 94086-3574 (408) 739-1434 • FAX (408) 739-1439



September 30, 2021

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand Lockheed Martin Corporation is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project:

247 Production Workers from Sunnyvale, Santa Cruz and Palo Alto

In strict adherence to ETP regulations, our letter of support is inclusive of the following language:

#### Exhibit E

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely.

Kévin Lee Business Representative (408)829-4563 klee@iam725.org





# EXPANSION FUNDS

## **Training Proposal for:**

# Los Angeles County Electrical Educational and Training Trust Fund

## Contract Number: ET22-0943

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: K. Mam

### PROJECT PROFILE

Contract	Apprenticship	Industry	Construction (C)
Attributes:	Retrainee	Sector(s):	
	Veterans		
	Priority Rate		
	Expansion Funds (Alt/Gen)		Priority Industry: 🖂 Yes 🔲 No
Counties		Repeat	
Served:	Los Angeles	Contractor:	🛛 Yes 🗌 No
Union(s): Yes I No International Bro		therhood of E	Electrical Workers Local Union 11
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

### FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$554,400		\$40,430 Job Number 1: 8% Job Number 2: 20%		\$594,830
In-Kind Contribution:	50% of	% of Total ETP Funding Required Inherent		

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Rang Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Apprentice	Commercial Skills, OSHA 30	270	8-200 Weighte	•	\$2,117	\$26.75
2	Retrainee Apprentice Veterans	Commercial Skills, OSHA 30	10	8-200 Weighte 11	-	\$2,324	\$26.75

#### \*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Job Numbers 1 & 2: \$19.77 per hour for Los Angeles County.
Health Benefits: Yes No This is employer share of cost for healthcare premiums –
medical, dental, vision.
Used to meet the Post-Retention Wage?: 🗌 Yes 🖾 No 📋 Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation			
Occupation Titles	Actual Wage Range	Estimated # of Trainees	
Apprentice Inside Wireman		270	
Veteran Apprentice Inside Wireman		10	

### **INTRODUCTION**

Founded in 1964, Los Angeles County Electrical Educational and Training Trust Fund also known as LA Electrical Training Institute (ETI) is a training organization serving Los Angeles County. ETI is governed by a Board of Trustees comprised of 3 labor and 3 management representatives and is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 11 and the Los Angeles County Chapter National Electrical Contractors Association (NECA). ETI has approximately 261 signatory contractors who contribute to the trust fund and understand the market advantage of having well-trained and qualified union electricians on their job sites. This will be ETI's fourth ETP Contract; the third in the last five years.

### Veterans Program

Ten Veteran trainees will participate in this project. The Veteran training curriculum will be the same as apprentice training outlined above. These trainees are in a separate job number to better track performance toward the goal of improved outreach for Veterans. Currently, 247 Veterans are registered as apprentices at ETI.

ETI recruits Veterans with the assistance of IBEW Local 11's full time Veterans Director who works in cooperation with Helmets to Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. Further, it hosts special days just for veterans to come in and apply for the apprenticeship program. Veterans who apply for an apprenticeship can skip the first stage (the written assessment) and go the second stage (the interview).

### Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour.

### PROJECT DETAILS

In order to remain competitive while utilizing new energy solutions, ETI must train on ongoing changes in the electrical industry. With a goal of 50% of existing buildings being retrofitted by 2030, ETI's apprentices need to be trained to install new energy solutions that meet or surpass the state's mandated energy efficiency requirements. ETP funded training will help give workers the needed skills to keep up with more stringent codes and new technologies. Projects during the term of this Agreement include the Clipper Arena Complex, The Grand (Downtown Los Angeles), Los Angeles International Airport, Los Angeles Light Rail, Lucas Museum, Oceanside Plaza, Los Angeles Unified School District, and Olive View Hospital.

### Training Plan

Training will be provided via Class/Lab and E-Learning methodologies at ETI's training centers.

**Commercial Skills:** Inside Wireman Apprentices learn to 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 sound and communications in any building or structure. Energy efficiency training is expected to be the centerpiece of the program because participating employers and property owners are demanding for these state-mandated construction methods and technologies.

### Certified Safety Training

<u>OSHA 30:</u> This training is a series of courses "bundled" by industry sector and occupation. 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.

### Marketing and Support Costs

There are 15 staff members who will assist with the marketing, recruitment, needs assessments and scheduling of training.

ETI requests 8% support costs for trainees in Job Number 1 and 20% support costs in Job Number 2 (Veterans) to allow ETI's staff to recruit and qualify additional apprentices for this program. While many apprentices have already been recruited, additional recruitment and assessment activities must occur to support apprenticeship training.

#### Commitment to Training

ETI provides commercial skills training for Inside Wireman Apprentices. Employers will continue to make contributions to the training trust fund for every hour worked by apprentices and journeyworkers. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Training Director of ETI will oversee this project with administrative assistance from 10 staff members. Additionally, the Company has retained a third-party administrator with extensive ETP administration experience to work closely with staff to complete the project successfully.

#### Trainer Qualifications

ETI has 11 full-time and 54 part-time instructors providing training. The instructors are former or current members of the trade who have received Master Certification status by the National Joint Apprenticeship and Training Committee. Currently, 11 instructors hold Career Technical Education Teaching Credentials in the Building and Construction Trades through the California Commission on Teaching Credentials.

#### Impact/Outcome

Certifications earned for the apprentice training listed above include: NFPA (National Fire Protection Association Arc Flash Training) 70E, Lead and Asbestos, First Aid, CALCTP (California Advanced Lighting Controls Training Program) Acceptance Testing, Qualified Safety Person, OSHA-30, and Industrial Skills Orientation.

### ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0923	\$379,266	9/21/2020- 9/20/2022	218	58	58

Based on ETP Systems, 17,461 reimbursable hours have been tracked for potential earnings of \$296,556 (78% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through June 2022.

### PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

	Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
Ī	ET20-0937	Los Angeles	11/4/2019– 11/3/2021	\$749,520	\$749,520 (100%)

### **DEVELOPMENT SERVICES**

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

### ADMINISTRATIVE SERVICES

Strategy Workplace Communications will also perform administrative services for a fee not to exceed 13% of payment earned.

### **TRAINING VENDORS**

N/A

### Exhibit B: Menu Curriculum

### Class/Lab & E-Learning Hours

8 – 200

Trainees may receive any of the following:

### COMMERCIAL SKILLS

### 2<sup>ND</sup> YEAR

- AC Systems, Level I
- 4 AC Theory, Levels I, II, III
- Application #5: Conduit Bending
- Application #6: Conduit Bending
- Application #7: Comb. Circuit Wiring
- Application #8: Transformer Connections
- Hueprints, Level I
- Blueprints, Level II
- Code Calculations, Level II
- ✤ Code Standards and Practices 2, 2017 NEC, Level I, II
- Codeology, Level I
- Conduit Fabrication
- ↓ Electrical Safety-Related Work Practices, Level I
- Mathematics
- Orientation, Level II
- Semiconductors, Level I
- Test Instruments, Level I
- Transformers, Level I

### 3<sup>RD</sup> YEAR

- AC Theory
- 4 Advanced Conduit Bending
- Hueprints, Level II
- Cad-welding
- Code and Practices 3, Level I
- **4** Commercial Blueprints
- 🖊 Conduit Bending: Rigid & EMT, Chicago & 555
- CPR/First Aid refresher
- Electrical Safety-Related Work Practices, Level II
- Fire Alarm Systems, Level I
- Ground Testing
- Grounding and Bonding, Level I
- Lighting Control Panels
- Motor Controls: Relays & Start/Stop
- One of: Field Estimating; Grounding; PV Design & Install; Transformers
- Preparing for Leadership
- PV Systems WORKBOOK
- Rigging, Hoisting, and Signaling
- Test Instruments
- Transformer Wiring
- Transformers

### 4<sup>TH</sup> YEAR

- Advanced Motor Control
- Blueprints (& Layout Yard)

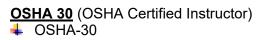
- Building Automation 1: Control Devices & Applications, Level I
- California Energy Commission Automated Demand Response
- Code Calculations
- Code Prep
- Grounding and Bonding
- Introduction to PLC's
- Motor Control Labs
- Motor Control, Level I
- 4 Motor Controls: Mag Starter & 3-wire control
- \rm Motors
- Motors, Level I, II
- PLCs (Programmable Logic Controllers)
- **4** Refinery Safety Orientation (RSO)
- Two of: Blueprint Reading; Field Estimating; PV Design & Install; Fire Alarm; Grounding; Transformers
- VFDs (Variable Frequency Drives)

### 5<sup>TH</sup> YEAR

- Advanced License Preparation
- Alternative Energy Sources
- Building Automation Systems
- CALCTP Acceptance Testing
- Code and Practices 4, Level I
- Code Calculations
- CPR/First Aid Refresher , Level I
- EVITP (Electrical Vehicle Infrastructure Training Program)
- Distributed Generation
- **4** Foreman Training: Managing the Work including NECA/IBEW Presentations
- Instrumentation Introduction
- 4 Intro to Lighting Control
- 🜲 License Prep
- Motor Control
- 🜲 NFPA 70E
- Orientation, Level III
- Power Quality
- PV/Solar Installer (Photo-Voltaic/Solar)
- Rigging, Hoisting & Signaling, Level I
- Structured Cabling
- 🜲 Torque, Level I
- One of: Blueprint Reading; Field Estimating; PV Design & Install; Service & Distribution; Fire Alarm; Grounding; Transformers; Foremanship

### ALL YEARS

- Advanced Lighting Control
- Arc Flash Safety Awareness
- Convention Center Orientation
- Linergy Audit Survey
- 4 Energy Storage and Microgrid Training and Certification (ESAMATC) Energy Storage
- Qualified Safety Person
- Rigging and Lifting
- Title 24 Lighting Installation and Codes



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



## **EXPANSION FUNDS**

## **Retrainee-Job Creation**

## **Training Proposal for:**

# Luxer Corporation

## Contract Number: ET22-0167

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: K. Mam

### PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative Expansion Funds (Alt/Gen)		Industry Sector(s):	Manufac	turing (E)
				Priority Ir	ndustry: 🛛 Yes 🔲 No
Counties Served:	Sacramento		Repeat Contractor:	🗌 Yes 🖂 No	
Union(s):	🗌 Yes 🛛 No				
Number of	Employees in:	CA: 175	U.S.:7,800		Worldwide: 48,500
<u>Turnover R</u>	late:	17%			
Managers/ (% of total tra	Supervisors: inees)	5%			

### **FUNDING DETAIL**

In-Kind Contribution
\$160,000

Total ETP Funding	
\$150,190	

### TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Rango Hou		Average Cost per	Post- Retention
NO.	Type of Training	Trainees	Class / Lab	СВТ	Trainee	Wage*	
1	Retrainee	Business Skills,	116	8-200	0-32	\$920	\$19.12
	Priority Rate	Commercial Skills, Computer Skills, Cont. Improv., Mgmt Skills, Manufacturing Skills		Weighte 40	-		
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, 27 Commercial Skills, Computer Skills, Cont. Improv., Mgmt Skills, Manufacturing Skills		8-200 Weighte 70	-	\$1,610	\$15.65

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1 (Retrainee): \$19.12 per hour for Sacramento
County. Job Number 2 (Job Creation): \$15.65 per hour for Sacramento County.
Health Benefits: Yes No This is employer share of cost for healthcare premiums –
medical, dental, vision.
Used to meet the Post-Retention Wage?: 🛛 Yes 🗌 No 🗍 Maybe

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1 and up to \$0.65 per hour for Job Number 2.

Wage Range by Occupation				
Occupation Titles	Actual Wage Range	Estimated # of Trainees		
Job Number 1 (Retrainee)				
		25		
Customer Service Staff		17		
		7		
Sales Staff		15		
Fulfillment Specialist (Production)		8		
Manager		13		
Supervisor		2		
Supervisor		7		
Painter		8		
Project Manager		9		

	5
Job Number 2	
Customer Service Staff	16
Fulfillment Specialist (Production)	2
Painter	4
Project Manager	5

### INTRODUCTION

Luxer Corporation (<u>www.luxerone.com</u>), a subsidiary of ASSA ABLOY Group, was founded in 2014 and is headquartered in McClellan. The Company manufactures package management and locker solutions for retail, residential, and mail and parcel services customers worldwide. Training under this proposal will be for its Sacramento location. This will be Luxer Corporation's first ETP Project.

#### Veterans Program

The Company does not actively recruit Veterans, however, they do provide veteran hiring preference.

### PROJECT DETAILS

Luxer Corporation is anticipating continuous growth within the next 5 years due to an increase in sales for its lockers. The Company is implementing a formalized training plan focused on upgrading the skills of its staff in order to meet the increase in demand. Training will focus on producing, assembling, and painting. This will require cross-training across workstations in order to gain competency across the production line.

Training will also focus on customer service, sales/marketing, and project management training. The Company has invested over \$100k in Sandler Training which will allow the Company to meet and exceed customer expectations.

#### **Retrainee - Job Creation**

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

Luxer Corporation has experienced a 15% increase in production capacities in the last two years and projects a continuous increase over the next two years The Company will hire 27 new employees (Job Number 2) including Customer Service Staff, Fulfillment Specialists (Production), Painters, and Project Managers. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

#### Training Plan

Training will be delivered via Class/Lab, E-Learning, Videoconferencing, and Computer Based Training (CBT) methods. Training will be delivered by in-house experts and vendors as needed in the following:

**Business Skills**: Training will be offered to all occupations. Training will focus on improving customer service skills. Training topics include Effective Communications, Customer Service Best Practices, and Project Management.

**Commercial Skills**: Training will be offered to Painters, Project Managers, and Fulfillment Specialists (Production). Training will focus on Powder Coating Best Practices.

**Computer Skills**: Training will be offered to all occupations. Training will focus on the Company's computer softwares. Training topics include Microsoft Applications and Zoho SAP/CRM System Training.

**Continuous Improvement**: Training will be offered to all occupations. Training will focus on teambuilding and process improvement. Training topics include Teambuilding, LEAN Processes, and Quality Process and Standards,

**Management Skills**: Training will be offered to Managers and Supervisors. Training will focus on Strategic Planning.

**Manufacturing Skills**: Training will be offered to Painters, Project Managers, and Fulfillment Specialists (Production). Training topics include Cross Training across Workstations, Production Equipment Operation, and Production Processes.

### Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0-32 hours of CBT.

### Commitment to Training

Luxer Corporation invests \$100,000 annually per facility on training including company orientation, sexual harassment, and basic safety. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Chief Financial Officer and Human Resources Generalist will be responsible for overseeing all aspect of the training project including communicating with managers, scheduling training, and tracking training hours. The Company has also retained a third-party administrator with extensive ETP administration experience to work closely with staff to complete the project successfully.

### **DEVELOPMENT SERVICES**

Strategic Business Solutions LLC in Visalia assisted with development of this proposal for a flat fee of \$7,250.

### ADMINISTRATIVE SERVICES

Strategic Business Solutions LLC will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

### TRAINING VENDOR

Sandler Training of Sacramento has been retained to provide Business Skills training for a fee of \$100,000. Other trainers will be identified for ETP record-keeping purposes, as they are retained.

### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning/Videoconferencing Hours

8-200 Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Account Development Training
- Customer Service Best Practices
- Effective Communications
- Project Management
- Sales and Marketing Training
- Sandler Administrative Training
- Time Management

### **COMMERCIAL SKILLS**

• Powder Coating Best Practices

### **COMPUTER SKILLS**

- Microsoft Applications
- Zoho SAP/CRM System Training

### **CONTINUOUS IMPROVEMENT**

- Coaching and Mentoring
- Leadership
- LEAN Processes
- Quality Process and Standards
- Supervisors Skills Training
- Teambuilding

### MANAGEMENT SKILLS (Managers and Supervisions only)

• Strategic Planning

### MANUFACTURING SKILLS

- Cross Training Across Work Stations
- Materials Handling Equipment Training
- Production Equipment Operation
- Production Processes

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

#### **CBT Hours**

0-32

#### **BUSINESS SKILLS**

- Sandler Foundation and Bronze Sales Training
  - Introduction of Terms and Concept (1 hr)
  - o The Importance of Building Rapport (1 hr)
  - Why Have a System? (0.75 hr)
  - Elements of and Up Front Contract (0.5 hr)
  - o Identifying the Reasons for Doing Business (0.5 hr)
  - Closing the Sale (0.75 hr)
  - Improving your BAT-ting Average (0.75 hr)
  - Prospecting Behavior (0.75 hr)
- Sandler Management Solutions
  - Managing Work Relationships (1 hr)
  - Goal Setting (1 hr)
  - Staging Effective Sales Meeting (1 hr)
  - Maximizing Personal Performance (1 hr)
  - Leadership Role (1 hr)
  - Managing Organizational Change (1 hr)
  - Territory Management (1 hr)
  - Facilitating Account Management (1 hr)
  - Understanding Your People (1 hr)
  - Improving Sales Team Performance (1 hr)
- Sandler Mastery Sales Training
  - Why Have a System (0.5 hr)
  - Bonding and Rapport (0.5 hr)
  - Up Front Contracts (0.5 hr)
  - Questioning Strategies (0.5 hr)
  - Pain (0.5 hr)
  - o Budget (0.5 hr)
  - Closing the Sale (0.5 hr)
  - Batting Average (0.5 hr)
  - Comfort Zone (0.5 hr)
  - Prospecting Plan (0.5 hr)
  - Negative Reverse Selling (0.5 hr)
  - Transactional Analysis (0.5 hr)
  - Formula For Success (0.5 hr)
  - Setting Goals (0.5 hr)
  - Prospecting Call (0.5 hr)
  - o Decision (0.5 hr)

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



**EXPANSION FUNDS** 

## **RETRAINEE - JOB CREATION**

## **Training Proposal for:**

# MAG Aerospace Industries, LLC

## Contract Number: ET22-0141

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: J. Romero

### PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate Expansion Funds (Alt/Gen)		Industry Sector(s):		turing (E) ce Related
				Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	Los Angeles		Repeat Contractor:	🛛 Yes 🗌 No	
Union(s):	on(s): 🗌 Yes 🖾 No				
Number of Employees in: CA: 339		U.S.:339		Worldwide: 95,000	
<u>Turnover R</u>	late:	13%			
Managers/Supervisors: 18%		18%			

### **FUNDING DETAIL**

In-Kind Contribution \$187,500

Total ETP Funding
\$148,120

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per	
				Class / Lab	СВТ	Trainee	Wage*
1	Retrainee	Business Skills; Computer Skills;	195	8-200	0	\$736	\$19.77
	Priority Rate	Continuous Impr; Manufacturing Skills; PL- Mfg Skills		Weighted Avg: 32			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills; Computer Skills; Continuous Impr; Manufacturing Skills; PL- Mfg Skills	5	8-200 Weighte 40	•	\$920	\$16.48

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Job Number 1: Los Angeles County \$19.77 per hour Job Number 2 (Job Creation): \$16.48 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?:** Xes No Maybe

Health benefits of up to \$2.45 per hour for Job Number 1 and up to \$0.19 per hour for Job Number 2 may be used to meet the Post-Retention Wage.

Wage Range by Occupation					
Occupation Titles	Actual Wage Range	Estimated # of Trainees			
JOB NUMBER 1:					
Administrative Staff		15			
		10			
Customer Service Staff		15			
		10			
		10			
Production Staff		5			
		5			
		25			
Technical Staff		10			
		5			
Engineer		25			
Manager/Supervisor		15			
		25			
JOB NUMBER 2:					
Administrative Staff		1			
Engineer		1			
Production Staff		1			
Technical Staff		1			
Manager/Supervisor		1			

ETP 130 - Single (Revised 3/5/2021)

#### INTRODUCTION

Founded in 1989, MAG Aerospace Industries, LLC (<u>www.safran-group.com</u>) (MAG Aerospace) is a wholly owned subsidiary of Safran S.A (Paris, France) as of 2019. Located in Carson, MAG Aerospace is a worldwide supplier and manufacturer of aircraft sanitation systems, trash compactors and Airstairs used in various aircrafts. It is committed to designing and developing water/waste integration focusing on passenger comfort, as well as health and safety. This will be MAG Aerospace's second ETP contract.

#### Veterans Program

Although there is no separate Veterans component in this project, MAG employs Veterans through normal hiring practices.

### PROJECT DETAILS

MAG Aerospace is facing a major shift in the needs and requirements within the industry. Since the pandemic started, major changes in travel and aircraft requirements have been enacted. In order to respond to these changes, the Company has updated and added products to its product lines. One major addition is Airstairs, which are specifically used in small aircrafts such as Cessna, Beechcraft, Embraer and Eclipse. This product is a set of steps built into an aircraft that allows passengers to board and exit aircrafts with minimal crew support and has a clamshell-style door which is mounted into the side or back of aircrafts, eliminating the need for passengers to use mobile stairway or jet way when boarding or exiting an aircraft.

With the recent addition and updates to its product lines, MAG Aerospace needs to train employees on new processes for the manufacturing of this product. Employees also need to be cross-trained in multiple fields of production to meet the new shift in production demands. Training will give employees new skillsets to perform their job in order to meet industry standards.

#### **Retrainee - Job Creation**

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

MAG is committed to creating jobs and opportunities in California. With the easing of restrictions to do business, the industry is slowly picking up pace and demand for its products is increasing. The Company will expand business capacity by hiring 5 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

#### Training Plan

**Business Skills**: This training will be offered to all occupations. Trainees will receive training in course topics such as Business Processes, Communication Skills, Conflict Management, Internal Customer Service Skills, Marketing Strategies, Product and Service Knowledge, and Project Management. This training will result in increased customer satisfaction and sales.

**Computer Skills**: This training will be offered to all occupations. Training will include Compliance Training, Engineering Software Applications, Manufacturing Resource Planning Software, MS Office (Intermediate and Advanced), and Project Management Applications. Improved computer skills will result in reduced errors and reduced operating costs.

**Continuous Improvement**: This training will be offered to all occupations. Trainees will participate in the various Continuous Improvement topics such as Change Management, Communication Skills, Increasing Productivity, Lean Manufacturing, Operating Procedures, Quality Control, Standard Work Instructions, and Team Problem Solving. Skills gained from training will improve overall productivity and cost reduction.

**Manufacturing Skills**: This training will be offered to Engineers, Production Workers, and Technical Staff. Trainees will learn new Manufacturing Skills including Assembly Procedures and Methods, Cross-Functional Production Equipment Training, Design Standards and Processes, Emergency Response Team Training, Forklift Procedures, Inspection Procedures, Manufacturing Operating Procedures, Production Processes, Repair Station Procedures, and Standard Operating Procedures. Increased manufacturing volume will allow the Company to increase productivity and grow profits.

#### Productive Laboratory

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

MAG will provide up to 20 PL training hours in Manufacturing Skills to 55 trainees (Production Staff and Engineers). The training will be specific to various machines and equipment used during production. This training cannot be duplicated in a Class/Lab setting as the equipment is large and complex. Given that some equipment require two employees to operate, training will be delivered at a max trainer-to-trainee ratio of 1:2.

#### Commitment to Training

MAG spends approximately \$80,000 annually for training. The Company will continue to fund training on OSHA-mandated safety regulations, sexual harassment prevention, new-hire orientations, basic computer skills training, and on-the-job production skills training after the proposed project ends.

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

For this ETP contract, MAG has designated a team of staff that includes the Human Resource Director, an HR Generalist, and 2 Managers and 2 Supervisors to oversee the ETP training and administration responsibilities. The Company has retained National Training Company, Inc. to assist in administration. The Company's HR Generalist will collect rosters which will be transmitted to its third-party administrative subcontractor.

### PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
18CS-0021	Los Angeles	08/01/2017– 07/31/2019	\$120,960	\$120,847 (99%)

### **DEVELOPMENT SERVICES**

MAG retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of \$7,000.

#### **ADMINISTRATIVE SERVICES**

MAG also retained National Training Company, 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/E-Learning Hours

8-200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Business Processes
- Communication Skills
- Conflict Management
- Internal Customer Service Skills
- Marketing Strategies
- Product and Service Knowledge
- Project Management

#### **CONTINUOUS IMPROVEMENT**

- Change Management
- Communication Skills
- Increasing Productivity
- Lean Manufacturing
- Operating Procedures
- Quality Control
- Standard Work Instructions
- Team Problem Solving

### COMPUTER SKILLS

- Compliance Training
- Engineering Software Applications
- Manufacturing Resource Planning Software
- MS Office (Intermediate and Advanced)
- Project Management Applications

### MANUFACTURING SKILLS

- Assembly Procedures and Methods
- Cross-Functional Production Equipment Training
- Design Standards and Processes
- Emergency Response Team Training
- Forklift Procedures
- Inspection Procedures
- Manufacturing Operating Procedures
- Production Processes
- Repair Station Procedures
- Standard Operating Procedures

### PL Hours

0 – 20

#### MANUFACTURING SKILLS (limited ratio 1:2)

- Assembly Procedures
- Calibration Equipment
- Forklift Procedures
- Production Assembly and Repair Equipment
- Standard Operating Procedures
- Testing Equipment

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.



## **EXPANSION FUNDS**

## **Retrainee-Job Creation**

## **Training Proposal for:**

# **Nor-Cal Pipeline Services**

## Contract Number: ET22-0176

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: K. Mam

### PROJECT PROFILE

Contract	Priority Rate		Industry	Construction (C)	
Attributes:	Retrainee		Sector(s):	( ),	
	Expansion Fund	ds (Alt/Gen)		Priority Industry: 🛛 Yes 🗌 No	
	Job Creation Initiative				
Counties Alameda, Los Angeles,		naeles	Repeat	☐ Yes ⊠ No	
Served:	Placer, Riverside, San Diego,		Contractor:		
	Yolo	io, can biogo,			
Union(s):	Local 185; Laborers' Internation			training Trust Fund for Northern California North America Local 1309; Operating Union of Operating Engineers Local 12	
Number of Employees in:		CA: 128	U.S.:128	Worldwide: 128	
Turnover Rate:		7%			
Managers/Supervisors: (% of total trainees)		0%			

### **FUNDING DETAIL**

In-Kind Contribution

\$339,485

Total ETP Funding	
\$180,320	

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per	Post- Retention
				Class / Lab	CBT	Trainee	Wage*
1	Retrainee Priority Rate	Business Skills, Comm'I. Skills, Computer Skills, Cont. Imp., HazMat, Hazwoper, OSHA 10/30, PL-Comm'I. Skills	121	8-200 Weighte 40	•	\$920	\$23.65
2	Retrainee Priority Rate Job Creation	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazwoper, OSHA 10/30, PL-Comm'l. Skills	50	8-200 Weighte 60	•	\$1,380	\$20.00

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$20.86 per hour for Alameda County, \$19.77 per hour for Los Angeles County, \$19.12 per hour for San Diego, and \$19.12 per hour for Placer, Riverside and Yolo counties

Job Number 2(Job Creation): \$17.39 per hour for Alameda, , \$16.48 per hour for Los Angeles County, \$15.81 per hour for San Diego, and \$15.65 per hour for Placer, Riverside and Yolo counties

**Health Benefits:** 🛛 Yes 🗌 No This is employer share of cost for healthcare premiums –

medical, dental, vision.

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

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

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1						
Administrative Staff		3				
		10				
Operator		40				
Laborer		1				
		41				
Sales Staff		1				
		8				
Operations Staff		17				

Job Number 2 (Job Creation)	
Administrative Staff	2
Operator	20
Laborar	7
Laborer	13
Sales Staff	2
	2
Operations Staff	4

### INTRODUCTION

Founded in 2007 and headquartered in Roseville, Nor-Cal Pipeline Services (<u>www.norcalpipe.com</u>) is a service contractor specializing in hydro excavation and underground pipeline repair and replacement. The Company provides services to contractors, PG&E, and local, state, and federal agencies statewide and in Oregon and Nevada. Training will take place at the Company's six locations in Roseville, Riverside, San Marcos, West Sacramento, Long Beach and Hayward. This is Nor-Cal Pipeline Services first ETP project.

#### Veterans Program

Currently Nor-Cal Pipeline Services does not actively recruit Veterans, however the Company is actively looking for ways to proactively hire veterans.

#### Union Support

Laborers are represented by Laborers' Training and Retraining Trust Fund of Northern California Local 185 and Laborers' International Union of North America Local 1309. Operators are represented by Operating Engineers Local Union No. 3 and International Union of Operating Engineers Local 12. The unions have submitted letters of support for this training project.

### PROJECT DETAILS

Nor-Cal Pipeline Services is implementing an extensive training plan focused on new technologies and services such as root control and cured in place piping. The Company has also invested over \$8M in new equipment including boiler and hydrovacuum trucks. In addition, Nor-Cal Pipeline Services has implemented a new software, Salesforce CRM in conjunction with Spira Data, which will allow the Company to streamline its internal processes. Staff will require complex technical training on these new technologies and equipment in order to remain competitive on bids.

Nor-Cal Pipeline Services will also continuously train on local codes due to constant updates in each jurisdiction's requirements. The Company provides services statewide and each jurisdiction requires different certifications. The Company participate in the Golden Shovel and ISNetworld quality and safety programs which requires employees to continually be certified on PG&E's and ISNetworld's updated protocols.

#### **Retrainee - Job Creation**

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

Nor-Cal Pipeline Services has experienced an increase in demand for its services and is expanding business operations by opening up a new office in Fresno in 2022. The Company will hire 50 new employees (Job Number 2) to meet demands and expansion. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

### Training Plan

Training will be delivered via Class/Lab, E-Learning, Videoconferencing, Computer-Based Training (CBT) and Productive Lab (PL) methods. Training will be delivered by in-house experts and vendors as needed in the following:

**Business Skills**: Training will be offered to all occupations and focus on customer service and project management. Training topics include Customer Relationship Management, Operational Skills and Project Requirements Analysis and Specifications.

**Commercial Skills**: Training will be offered to Laborers and Operators and focus on equipment operation and troubleshooting. Training topics include Equipment Maintenance/Repair, Heavy Machine Operation and Trenching.

**Computer Skills**: Training will be offered to all occupations and focus on the Company's software. Training topics include Spira, Salesforce, and Intermediate and Advanced Office (II & III).

**Continuous Improvement**: Training will be offered to all occupations and focus on cross training and process improvement. Training topics include Production Operations/Workflow, Problem Solving and Decision Making and Process Improvement.

**Hazardous Materials:** Training will be offered to Laborers and Operators and focus on Bloodborne Pathogen training.

### Certified Safety Training

<u>OSHA 10/30.</u> 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.

<u>Hazardous Waste Operations and Emergency Response Standard (HAZWOPER)</u>. This training is a series of courses specifically designed for workers who handle hazardous substances as firstresponders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

### Computer-Based Training

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive up to 40 hours of CBT.

### Productive Laboratory

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

Operators and Laborers will receive training in PL-Commercial Skills including Equipment Maintenance/Repair, Excavating, Heavy Machine Operation, and Mechanical, Electrical and Plumbing. Equipment to be used includes Hydrovac trucks, boiler trucks, backhoes, trenchers, and radio detection equipment.

Trainees will work with a trainer who will demonstrate step-by-step instructions. Afterwards, the trainer will observe trainees performing the tasks. Most tasks are completed individually; however, some equipment will require groups of three. Production will be negatively impacted during training as trainees are learning. Nor-Cal Pipeline Services is requesting a 1:3 trainer-to-trainee ratio and up to 100 PL training hours due to the extensive safety requirements needed to perform job duties. This will allow the Company to provide the hands on training necessary to remain safe and productive.

### Commitment to Training

The Company invests \$20,000 annually per facility on training including orientation, safety training and legal compliance. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

> Training Infrastructure

The Human Resources Manager and Accounting Manager will oversee all aspects of this training project including communicating with staff at each facility to ensure recordkeeping meets ETP compliance. Additionally, the Company has retained a third-party administrator with extensive ETP administration experience to work closely with staff to complete the project successfully.

### **DEVELOPMENT SERVICES**

Carrazco LLP, Innovative Tax Solutions in Sacramento assisted with development of this proposal for a flat fee of \$18,000.

### ADMINISTRATIVE SERVICES

Carrazco LLP, Innovative Tax Solutions will also perform administrative services for a fee not to exceed 13% of payment earned.

### TRAINING VENDORS

To Be Determined

# Exhibit B: Menu Curriculum

### Class/Lab/E-Learning/Videoconference Hours

8-200 Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Business Fundamentals
- Communication Styles
- Company Culture Development
- Cost Control
- Customer Relationship Management
- Customer Service
- Develop Employee Accountability
- Employee Coaching
- Employee Engagement
- Financial Analysis
- Interpersonal Communications
- Marketing/Sales Techniques & Strategy
- Negotiating
- Operational Skills
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Relationship Building
- Retaining Customers
- Strategic Planning

# **COMMERCIAL SKILLS**

- 🖶 Backfill
- Bell Holes
- Change Order Management
- Change Order Negotiations
- Compacting
- Compliance with Customer Safety Programs
- Compliance with Underground Service Alert (USA) Requirements
- Confined Space
- Construction Contract Administration
- Construction Cost Awareness and Production
- Construction Job Site Logistics/Sequencing
- **4** Construction Management
- Construction Team Support
- Contract Documents and Construction Law
- Lured-in-Place-Pipe
- Daylighting
- Environment Impact Planning
- Equipment Maintenance/Repair
- Equipment Operation
- Estimating
- Excavating
- Foreman's Advantage
- Forklift/Scissor Lift

- Ground Penetrating Radar
- Hand Tools
- Heat Illness Prevention
- Heavy Machine Operation
- How to Complete a Work Authorization
- How to Deal with Public (Public Relations)
- \rm Hydroflush
- Hydrovacuum
- 4 Insurance
- Lock Out/Tag Out
- Managing Subcontractors
- 4 Manhole Rehabilitation
- Mechanical, Electrical and Plumbing
- Obtaining and Processing Permits
- ✤ Offsite Spoils Disposal
- Onsite Spoils Management
- Personal Protection Equipment
- Planning and Scheduling
- Product Knowledge
- Production Reporting
- Project Documentation
- Project Management
- Proper Rigging of Equipment (Transportation)
- Purchasing Procedures
- Radio Detection
- Resource Scheduling
- Rigging and Signaling
- Safe Excavations Techniques
- Safe Potholing Operations
- ✤ Safe Traffic Control and Flagging Operations
- Sewer Operations
- Storm Drain Operations
- Traffic Control
- Trenching
- Unit Cost Tracking
- USA Ticket Management
- Utility Locating
- Work Orders

# **COMPUTER SKILLS**

- Advanced Excel
- Financial Management System (ProContractor by Viewpoint)
- Intermediate and Advanced Office (II & III)
- \rm 4 Spira
- Safety by HCSS
- Social Media Linked in
- Salesforce

# **CONTINUOUS IMPROVEMENT**

- Cross Training
- Coaching Procedures
- Communication Skills
- Creating a Quality Organization

- Decision Making
- Effective Meetings for Leaders
- Leadership
- Process Improvement
- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Project Management
- Problem Solving and Decision Making
- Supervisor Skills
- Team Building
- Teamwork Development Skills
- Time Management

# HAZARDOUS MATERIALS

Bloodborne Pathogen

# HAZWOPER

HAZWOPER 40

# OSHA 10/30 (Certified OSHA Instructor)

- 🖶 OSHA 10
- 🔸 OSHA 30

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

# CBT Hours

0-40

# **COMMERCIAL SKILLS**

- Back Safety Basics & Update (0.5 hr)
- Confined Space Awareness (0.6 hr)
- Dig In Prevention (0.42 hr)
- Directing Vehicles (0.38 hr)
- Electronic Logging Device (ELD) Log Book Training (0.5 hr)
- Equipment & Tool Hazards (2.27 hrs)
- Fall Prevention (1.68 hrs)
- Fire Safety (0.57 hr)
- HazCom (0.72 hr)
- Health & Wellness (0.37 hr)

# <u>OSHA 10</u>

- Caught In or Between (0.5 hr)
- Cranes, Derricks, Hoists, Elevators & Conveyors (0.5 hr)
- Electrocution (1 hr)
- Excavations (0.5 hr)
- Falls (1.5 hrs)
- Health Hazards in Construction (0.5 hr)
- Introduction to OSHA (1 hr)
- ↓ Materials Handling, Storage, Use and Disposal (0.5 hr)
- Personal Protective and Lifesaving Equipment (0.5 hr)

- Scaffolds (0.5 hr)
- Stairways and Ladders (0.5 hr)
- Struck-By (1 hr)
- Tools Hand and Power (0.5 hr)

# <u>OSHA 30</u>

- Asbestos Awareness (0.5 hr)
- Asbestos for Supervisors (2 hrs)
- Caught-in or Between (1.5 hrs)
- Confined Spaces (0.5 hr)
- Cranes, Derricks, Hoists, Elevators and Conveyors (0.5 hr)
- Electrical Safety (2 hrs)
- Ergonomics (0.5 hr)
- Excavations (0.5 hr)
- Fall Prevention (1.5 hrs)
- Fire Protection and Prevention (0.5 hr)
- Foundations for Safety Leadership (2 hrs)
- Hand and Power Tool Safety (1 hr)
- Hazard Communication (0.5 hr)
- Hazardous Materials (0.5 hr)
- Health Hazards in Construction (2 hrs)
- Introduction to OSHA (1 hr)
- Lead Awareness (0.5 hr)
- Lead Exposure (0.5 hr)
- Managing Safety and Health (2 hrs)
- Materials Handling, Use and Disposal (0.5 hr)
- ♣ Motor Vehicles (0.5 hr)
- Personal Protective Equipment (2 hrs)
- Rollover Protective Structures, Signs, Signals and Barricades (0.5 hr)
- Safety and Health Programs (0.5 hr)
- Scaffolds (0.5 hr)
- Silica Exposure (0.5 hr)
- Stairways and Ladders (1 hr)
- Steel Erection (0.5 hr)
- Struck-by (1 hr)
- Welding and Cutting (0.5 hr)

Productive Lab Hours (1:3 trainer-to-trainee ratio)

0-100

# COMMERCIAL SKILLS

- Backfill
- \rm Bell Holes
- Compacting
- Construction Job Site Logistics/Sequencing
- ♣ Cured-in-Place-Pipe
- Daylighting
- ♣ Equipment Maintenance/Repair
- Equipment Operation
- Excavating
- Forklift/Scissor Lift
- Ground Penetrating Radar
- Hand Tools
- Heavy Machine Operation

- Hydroflush
- Hydrovacuum
- **4** Manhole Rehabilitation
- Mechanical, Electrical and Plumbing
- ✤ Offsite Spoils Disposal
- Onsite Spoils Management
- Proper Rigging of Equipment (Transportation)
- Radio Detection
- Rigging and Signaling
- Safe Excavations Techniques
- Safe Potholing Operations
- Safe Traffic Control and Flagging Operations
- Sewer Operations
- **4** Storm Drain Operations
- Traffic Control
- 4 Trenching
- 4 Utility Locating
- Work Orders

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



8/02/21

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand Nor-Cal Pipeline Services is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: 30 Current Employees and potentially up to 10 new hires (over the next 2 years) in Laborers.

(Exhibit language must be included in the Union letter of support)

# <u>Exhibit E</u>

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely,

LA

Leonard Gonzales Executive Director



MARIO SUALES **Business Manager-**Secretary Treasurer

PETER SANTILLAN President

ARTURO ALVAREZ Vice President

**JOSHUA LA FARGA Recording Secretary** 

ALFONSO MADRIGAL JULIAN JIMENEZ RAY REZA **Executive Board** 

3971 Pixie Ave. Lakewood, CA 90712 562.421.9346 Fax: 562.421.5964

www.local1309.com

Laborers' International Union of North America



8/04/21

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

Dear Panel Members,

We understand Nor-Cal Pipeline Services is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: 16 Current Employees and potentially up to 10 new hires (over the next 2 years) in Laborers.

#### Exhibit E

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely,

Mario Suales Business Manager/Secretary Treasurer LiUNA! Local 1309

# Feel the Power



# **OPERATING ENGINEERS LOCAL UNION NO. 3**

3920 LENNANE DRIVE, SACRAMENTO, CA 95834 • (916) 993-2055 • FAX (916) 419-3491 Jurisdiction: Northern California, Northern Nevada, Utah, Hawaii, and the Mid-Pacific Islands

8/12/21

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand Nor-Cal Pipeline Services is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: 21 Current Employees and potentially up to 10 new hires (over the next 2 years) in Operating Engineers.

# Exhibit E

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely,

John Rector



International Union of Operating

RONALD J. SIKORSKI Business Manager and General Vice President Southern California & Southern Nevada

August 6, 2021

Reg Javier, Executive Director Employment Training Panel 1100 J Street Sacramento, CA 95814

Re: Application to Employment Training Panel For Nor-Cal Pipeline Services

Dear Mr. Javier:

We understand Nor-Cal Pipeline Services is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: 22 current employees and potentially up to 10 new hires (over the next 2 years) in Operating Engineers.

Our Union received a Notice of Intent to train Collective Bargaining Agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

The International Union of Operating Engineers, Local 12, is in full support of the Nor-Cal Pipeline Services application for State Training Funds.

If you have any questions, please feel free to contact me at (626) 792-8900.

Sincerely,

Ronald J. Sikorski, Business Manager I.U.O.E., Local Union No. 12 and General Vice President

RJS:va



# **EXPANSION FUNDS** Training Proposal for:

# Northern California Surveyors Joint Apprenticeship Committee

# Contract Number: ET22-0912

# Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

# PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Retrainee Priority Rate Apprenticeship	Industry Sector(s):	Construction (C)
	Journeyworker		
			Priority Industry: 🛛 Yes 🗌 No
Counties		Repeat	
Served:	Statewide	Contractor:	Yes 🗌 No
Union(s):	Yes 🗌 No Operating Engin	eers Local No	0. 3
Turnover R	ate:	≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

# **FUNDING DETAIL**

Program Costs	+	Support Costs	=	Total ETP Funding
\$444,360		\$30,850 8%		\$475,210
In-Kind Contribution:	50% of <sup>-</sup>	Total ETP Funding Required	1	Inherent

# TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours		Average Cost per	Post- Retention
No.		Type of Training	Trainees	Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Commercial Skills	155	8–200	0	\$2,772	\$30.56
	Apprentice			Weighte	d Avg:		
	Priority Rate			144	1		
2	Retrainee	Commercial Skills	25	8–200	0	\$590	\$43.66
	Journeyworker Priority Rate			Weighte 24	•		
3	Retrainee	Commercial Skills	20	8–200	0	\$1,540	\$26.08
	Pre-Apprentice Priority Rate			Weighte 80	•		

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: \$26.08 per hour (SET Priority / Statewide)						
Health Benefits: Yes No This is employer share of cost for healthcare premiums –						
medical, dental, vision.						
Used to meet the Post-Retention Wage?: 🛛 Yes 🗌 No 📄 Maybe						
Up to \$4.25 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 and 3.						
This amount has been verified in the collective-bargaining agreement wage tables.						

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1 (Apprentice)						
Surveyor		155				
Job Number 2 (Journeyworker)						
Surveyor		25				
Job Number 3 (Pre-Apprentice)						
Surveyor		20				

# INTRODUCTION

The Operating Engineers Local Union 3 and the California and Nevada Civil Engineers and Land Surveyors Association founded the Northern California Surveyors Joint Apprenticeship Committee (Northern California Surveyors or the Trust) in 1975 as a labor-management committee to train Surveyors. The apprenticeship program is conducted jointly by Operating Engineers Local Union 3 and union employers covering the Northern California region. Training will take place at various locations throughout the 46 Northern California counties covered by Northern California Surveyors. This will be Northern California Surveyors seventh ETP Contract; the fifth in the last five years.

Surveyors determine the proper location of property lines, make accurate field measurements, and use equipment such as global positioning systems and other high tech equipment to determine the topography of the surface of the earth. This proposal is designed to upgrade skills and better prepare surveyors to utilize the most technologically advanced equipment in commercial and industrial construction and public infrastructure projects. Northern California Surveyors currently serves approximately 35 small employers and 4 large employers. This project will serve approximately 155 Apprentices, 20 Pre-Apprentices, and 25 Journeyworkers.

#### Veterans Program

Northern California Surveyors engages in community outreach to Veterans by attending career fairs, the Bay Area Apprentice Coordinators Association, Helmets to Hard Hats, and meetings with other groups. Once recruited, Veterans receive additional points towards their application into the program to boost their overall score creating easier access to the program. They also receive a discounted application fee when joining the union. Many employers give priority to veterans when hiring a new apprentice. Currently there are 20 Veterans in the program, but Northern California Surveyors is not requesting a separate Veterans' Job Number for ease of administration.

### Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is four years. The curriculum is developed with input from DAS and a designated Local Educational Agency (Castro Valley Adult School).

For the building trades, it is not customary for workers to be employed for a standard retention period of 90-consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour. The ETP wage for Apprentices is no less than \$26.08 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

# **Employer Demand**

ETP funding will expand and upgrade the Northern California Surveyors' program. Training under this project will better prepare Surveyors to utilize the most technologically advanced equipment in commercial and industrial construction and public infrastructure projects. To control rising costs while maintaining workers' wages, employers must adopt new technologies and improve systems to reduce waste and improve productivity. This training will enable employers to bid on additional jobs and specialized projects, improving job security and reducing periods of unemployment. This includes technologies such as 3D laser scanning and Total Station instrument, an electronic/optical device that integrates an electronic theodolite with electronic distance measurement to read slope distances, and an on-board computer to collect data and perform calculations. The Northern California Surveyors reports that the following projects are driving employer demand: High Speed Rail; Paradise Park; PG&E projects throughout Northern California; numerous Caltrans' projects.

# PROJECT DETAILS

All training under this proposal will provide Surveyors with skills in demand by employers in Northern California. The curriculum is continuously reviewed and updated based upon the industry expertise of the membership. Trainers are experienced Journeyworkers who have experience and formal instruction in training methods and subject matter

### Training Plan

Training will be provided via Class/Lab and E-Learning methodologies for all trainees.

**Commercial Skills:** This training will be provided to all trainees and will include Total Station Devices and 3D Laser Scanning and Robotic Instruments for Journeyworkers. Apprentices will be trained in Applied Algebra, Geometry, Trigonometry, as well as tools, software systems and technologies, and the Types of Surveys. Pre Apprentices will be introduced to the trade, including Field Surveying, Mathematic Concepts, Planning, and Instruments.

### Marketing and Support Costs

Employers are notified of training through association web sites, mailings, and presentations. Employers participate as members of the Trust and training is designed around their needs and the general needs of the industry. Although many participating employers have already been recruited, additional recruitment will take place to complete the project and replace any employers whose training needs change. Assessment of employer-specific job requirements will take place during the term of the contract. As such, Northern California Surveyors is requesting 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. Staff recommends approval of these support costs.

#### 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

Northern California Surveyors' Administrator (dedicated administrator) will oversee the project along with three staff (Trainers and Assistant to Administrator) who will schedule classes and provide training coordination. These staff also work on recruitment efforts, needs assessments for trainees, and ETP administration. In addition, the Trust has retained a third-party subcontractor, Steve Duscha Advisories, to assist with ETP administration.

#### Impact/Outcome

The Pre-Apprentice population will become Apprentices by retention. Many Apprentices will become Journeyworkers and help upgrade skills to keep them competitive in the industry.

### Tuition Reimbursement

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

### > Wage Modification

For trainees employed in a priority industry, the Panel may modify the wage up to 25% below the statewide average hourly wage (from \$34.77 to \$26.08). The Trust requests this modification for Job Numbers 1 and 3.

### Recordkeeping

Alternative recordkeeping method is requested due to the current COVID-19 pandemic.

# ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0952	\$339,193	2/1/21 – 1/31/23	157	0	TBD

Based on ETP Systems, 0 reimbursable hours have been tracked for potential earnings of \$0 (0% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers.

# PRIOR PROJECTS

The following table summarizes Contractor's performance under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%	
ET20-0922*	Northern and Central California	9/3/19 – 9/2/21	\$475,280	TBD*	
ET18-0909	Northern and Central California	9/25/17 – 9/24/19	\$292,330	\$292,330 (100%)	
ET16-0918	Northern and Central California	2/1/16 – 1/31/18	\$186,104	\$186,104 (100%)	

\*Based on ETP systems, 27,687 potentially reimbursable hours have been tracked for potential earnings of \$475,280 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently delivered and invoices reflecting full amount requested are under ETP's review.

# **DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development 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

#### Class/Lab/E-Learning Hours

8-200 (Job Number 1)

#### **Apprentices**

Trainees may receive any of the following:

### **COMMERCIAL SKILLS**

- Algebra I
- Algebra II
- Angles
- Area by Coordinates
- Boundary Retracement / Field Result
- Boundary Retracement / Pre Steps
- Circle Solutions
- Conducting the Survey
- Construction Control Surveys
- Construction Staking
- Data Collection System
- Documenting a survey
- Earthwork & Volume
- Functions Boundary Survey
- Geometry
- Global Positioning System (GPS) Topic 1
- GPS Topic 2
- GPS Topic 3
- GPS Topic 4
- Highway Construction Surveys
- Horizontal Curves
- Introduction to Computers
- Introduction to Traverse
- · Introduction / History Boundary Surveying
- Latitude, Departure & Coordinates
- Legal Description / Easements
- Metric Systems / Conversions
- Municipal Street Construction
- Oblique Triangles
- Omitted Measurement
- Partitioning of Land
- Photogrammetric Surveys
- Plan, Profile, & Section
- Preparing for a Survey
- Rectangular Coordinates System
- Reporting
- Safety Training Review
- Safety-Heat Stress
- Solving Equations Part 2
- Subdivision
  - Topographic Surveying & Mapping
  - Total Station
- Traverse Lines
- Traverse-Precision
- Traverses-Methods & Procedures

- Trigonometry
- Vertical Curves

#### Class/Lab/E-Learning Hours

```
8-200 (Job Number 2)
```

#### Journeyworker

Trainees may receive any of the following:

# **COMMERCIAL SKILLS**

- 3D Laser Scanning
- Advanced Global Positioning System / Global Navigation Satellite Systems
- Advanced Survey Calculator
- In-Depth Plan Reading
- Latest Techniques in Leveling including Digital
- Photogrammetry
- Robotics
- Boundary Retracement
- Total Station

### Class/Lab/E-Learning Hours

8-200 (Job Number 3)

# **Pre-Apprentices**

Trainees may receive any of the following:

# **COMMERCIAL SKILLS**

- Introduction to Apprenticeship
- Introduction to Field Surveying
- Introduction to Pacing, Chaining and Instruments
- Introduction to Plans and Calculations
- Safety Procedures
- Survey Math and Calculator

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.



# **EXPANSION FUNDS** Training Proposal for:

# Operating Engineers and Northern California Surveyors Pre-Apprenticeship, Apprenticeship and Journeyman Affirmative Action Training Fund

# Contract Number: ET22-0931

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

# PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Apprenticship Retrainee Priority Rate	Industry Sector(s):	Construction (C)
			Priority Industry: 🛛 Yes 🔲 No
Counties		Repeat	
Served:	Northern California	Contractor:	🛛 Yes 🗌 No
Union(s):	Yes INo International Uni	on of Operati	ing Engineers Local No. 3
Turnover R	ate:	≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

# FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$278,976		\$19,344 8%		\$298,320
In-Kind Contribution:	50% of	Total ETP Funding Required	I	Inherent

# TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Rang Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Priority Rate Pre-Apprentice	Commercial Skills	40	8–200 Weighte 160	•	\$770	\$27.53
2	Retrainee Priority Rate Apprentice	Commercial Skills	80	8–200 Weighte 80	•	\$385	\$30.03
3	Retrainee Priority Rate Journeyworker	Commercial Skills	88	8–200 Weighte 24	•	\$147.50	\$50.05

### \*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Modified Statewide Average Wage is \$26.08 per hour (CBA wage					
\$27.53 in Job Number 1; \$30.03 in Job Number 2; and \$50.05 in Job Number 3).					
<b>Health Benefits:</b> Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.					
Used to meet the Post-Retention Wage?:  Yes X No Maybe					

Although employer(s) provide health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation						
Occupation Titles	Post-Retention Wage Range	Estimated # of Trainees				
Job Number 1 (Pre-Apprentice)						
Construction Inspector		40				
Job Number 2 (Apprentice)						
Construction Inspector		80				
Job Number 3 (Journeyworker)						
Construction Inspector		88				

# **INTRODUCTION**

Founded in 2005, Operating Engineers and Northern California Surveyors Pre-Apprenticeship, Apprenticeship and Journeyman Affirmative Action Training Fund (<u>http://teapprenticeship.org</u>) (Operating Engineers) is a joint labor-management committee comprised of representatives from the inspection and testing industry through its trade association and labor organization. Trainees in this project will be Construction Inspectors. Training will occur via E-Learning or in-person at the Rancho Murieta Training Center.

Construction Inspectors ensure the structural integrity of commercial and industrial buildings, roads, and bridges by performing four main tasks: (1) monitoring materials and workmanship on the job site; (2) assuring that relevant codes and approved plans are followed; (3) performing tests and job related duties necessary for quality inspections; and, (4) communicating and working closely with contractors, engineers, and city and county building departments.

This will be the Operating Engineers' fifth ETP Contract, and its fourth in the last five years. Operating Engineers provides training for employees of third-party inspection and testing contractors (employers) in 46 Northern California counties. Operating Engineers currently serves approximately 20 small employers and 5 large employers.

### Veterans Program

Even though a separate Veteran's Job Number is not being requested at this time to help ease Contract administration, Operating Engineers serves and actively recruits veterans into the program. Currently, the program has six veterans in its Apprentice population.

To recruit veterans, Operating Engineers participates in various outreach job-fair programs and hiring activities throughout Northern California including working with Helmets to Hardhats and receiving referrals from EDD's One-Stop job centers. In order to incentivize veterans to join the program, all veterans who apply receive a bonus in the point ranking system which allows for expedited admission to Apprentice training positions and program.

# Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the, program is two years. The curriculum is developed with input from DAS and a designated Local Educational Agency (LEA) - State Center Community College District.

For the building trades, it is not customary for workers to be employed for a standard-retention period of 90-consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified-retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified-retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour. The ETP wage for Apprentices is no less than \$26.08 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

# **Employer Demand**

ETP funding will expand and upgrade the Operating Engineers' program. Training under this proposal will help Operating Engineers meet employer demand throughout Northern California as employers require new and highly specialized skills from Journeyworkers, including skills in emerging technologies in concrete such as new research and development of concrete materials, applicable-field applications, quality assurance, and quality control and construction techniques

for the following materials: roller compacted concrete, shotcrete, and self-consolidating and high-strength concrete.

Operating Engineers reports that the following projects are driving employer demand under this proposal: California's High Speed Rail; San Francisco Civic Center; San Francisco International Airport; and, the Big Bird Amazon Warehouse.

# PROJECT DETAILS

This project will train Construction Inspectors in the "special inspection" functions of construction inspecting. Special inspection requires the monitoring of construction materials and workmanship, which are critical to the integrity of building structures. This includes reviewing the work of contractors to ensure the approved plans and specifications are followed and relevant building codes and municipal ordinances are observed. The special-inspection process occurs in addition to inspections conducted by the municipal building inspector and by the design professional responsible for a particular job. Special inspectors perform continuous or periodic inspection and testing, depending on specific job types and circumstances of each job.

These 'special inspection' functions require skilled, experienced, and credentialed inspectors. Well-trained inspectors are key to structural integrity and safety of construction projects. To win contracts and maintain employment levels, employers must have highly skilled and certificated workers like those trained under this application. As construction work continues to expand in Northern California, there is a need for more inspectors and inspectors are required to obtain more specialized certifications to perform inspection work. Certifications, which once were voluntary, are now often mandatory for inspectors to work on job sites.

# Training Plan

Training will be delivered via Class/Lab & E-Learning in the following:

**Commercial Skills:** This training will be provided to Pre-Apprentices, Apprentices, and Journeyworkers on training topics that include Concrete Field Testing, Introduction to Plan Reading, Fundamentals of Concrete, Emerging Technologies in Concrete, Non-destructive Testing, Quality Assurance, Soils and Earthwork, and Structural Welding.

# Marketing and Support Costs

Operating Engineers notifies employers of training through association web sites, mailings, and presentations. Employers participate as members of the Trust, and training is designed around their needs and the general needs of the industry.

Although many participating employers have already been recruited, additional recruitment will take place to complete the project and replace any employers whose training needs change. Assessment of employer-specific job requirements will take place during the term of the Contract. Total support costs for these activities exceed the projected personnel cost of these activities. Therefore, Operating Engineers requests 8% support costs. Staff recommends the 8% support costs.

# 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

Operating Engineers' Training Coordinator (dedicated administrator) will oversee the project. Operating Engineers' staff will schedule classes, while also providing training coordination. Three staff will work part-time on marketing, recruitment, needs assessments, and scheduling training. Operating Engineers have also hired a third-party subcontractor to provide administrative services for the ETP Contract.

#### > Wage Modification

For trainees employed in a priority industry, the Panel may modify the wage up to 25% below the statewide average hourly wage (from \$34.77 to \$26.08). The Company requests this modification only for Job 1 to \$27.53, the Collective bargaining Agreement Wage.

#### Trainer Qualifications

Trainers are experienced journey level workers who have experience and formal instruction in training methods and subject matter. Vendors with unique technical knowledge and qualifications may provide training is needed.

#### Impact/Outcome

The specialized training included in the curriculum prepares trainees for nationally recognized certifications in the construction inspection industry. The training provides workers and contractors with the skills they need to win bids and complete high quality jobs at a competitive pace.

Depending on areas of specialization, trainees may earn one or more of the following certifications: American Concrete Institute Field Testing Technician; International Code Council Spray Applied Fire Proofing Special Inspector; American Concrete Institute Lab Technician; American Concrete Institute Base Aggregate Technician; International Code Council Special Inspector; International Code Council Reinforced Concrete; International Code Council Structural Steel Bolt and Weld; International Code Council Reinforced Masonry; International Code Council Pre-Stressed Concrete; International Code Council Commercial Building Inspector; International Code Council Special Code Council Special Inspector; Nuclear Gauge Safety.

#### **Tuition Reimbursement**

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

#### Recordkeeping

Due to the COVID-19 pandemic, an Alternative Recordkeeping method is being requested.

# ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0947	\$212,110	3/1/21 – 2/28/23	134	TBD	TBD

Based on ETP systems, 0 reimbursable hours have been tracked for potential earnings of \$0 (0% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through contract closeout.

# PRIOR PROJECTS

The following table summarizes Contractor's performance by Operating Engineers under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%	
ET20-0907*	Alameda	8/1/19 – 7/31/21	\$298,320	TBD	
ET17-0907	Alameda	10/1/16 – 9/30/18	\$281,820	\$225,908 (80%)	

\*Based on ETP systems, 19,160 potentially reimbursable hours have been tracked for potential earnings of \$298,320 (100% of approved amount). The Contractor projects completing invoicing by August 2021.

# **DEVELOPMENT SERVICES**

Operating Engineers retained Steve Duscha Advisories in Sacramento to assist with development of this proposal for a flat fee of \$10,000.

# ADMINISTRATIVE SERVICES

Steve Duscha will also perform administrative services in connection with this proposal for a fee of, not to exceed 10% of payment earned.

# TRAINING VENDORS

To Be Determined

### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200 (Job Number 1)

#### **Pre-Apprentice**

Trainees may receive any of the following:

### **COMMERCIAL SKILLS**

- Concrete Field testing
- Temperature of freshly mixed concrete
- Sampling of freshly mixed concrete
- Slump of hydraulic cement concrete
- Unit weight, yield, and air content of concrete
- Air content of freshly mixed concrete by pressure method
- Air content of freshly mixed concrete by volumetric method
- Making and curing concrete test specimens in the field
- Radiation safety and use of nuclear gauges
- Principles of radiation safety and health physics
- Principles of nuclear physics related to moisture and density measurements
- Licensing and compliance with regulatory requirements for radiation safety
- Transportation and shipping of portable nuclear gauges
- Use and maintenance of portable nuclear gauges
- Fundamentals of concrete
- Strength and durability of concrete
- Volume changes and other properties of concrete
- Cracks and blemishes in concrete
- Portland cement, aggregates, water and admixtures in concrete
- Batching and mixing concrete
- Hot and cold weather concreting
- Lightweight and heavyweight concrete
- Introduction to concrete inspection
- Introduction to plan reading
- Design-construction sequence
- Plan views, elevations and sections
- Drawing simple isometric sketches
- Reading an architects' scale and identifying plan scales
- Identifying plane lines symbols and reference marks by coordinating drawings
- Orienting plan section details and elevations to other plans
- Identifying common structural steel shapes, reinforcing steel and their designations
- Interpreting indexes and keys on commercial construction drawings
- Using a grid system to locate columns and piers
- Interpreting foundation plans, structural details and sections to identify dimensions, reinforcement and location of various elements
- Data analysis

- Report writing
- Inspecting spray applied fireproofing: reading and interpreting plans, verifying materials, minimum required coverage and thickness of fireproofing, sampling, testing, job protocols.

#### Class/Lab/E-Learning Hours

8-200 (Job Number 2)

#### Apprentice

Trainees may receive any of the following:

#### COMMERCIAL SKILLS

- International Code Council reinforced concrete certification
- International Code Council structural steel bolt and weld
- Non-destructive testing and magnetic particles
- Certified welding inspection certification
- International Code Council structural masonry certification
- Pre-stressed concrete certification
- International Code Council commercial building inspector certification
- American Concrete Institute lab technician certification
- International Code Council soils section inspector certification
- Asphalt laboratory and field fundamentals
- American Concrete Institute base aggregate technician certification

#### Class/Lab/E-Learning Hours

8-200 (Job Number 3)

#### Journeyworker

Trainees may receive any of the following:

#### COMMERCIAL SKILLS

- Administration of building obstruction codes and standards
- Building construction
- Building inspections
- Customer service for an inspector
- Emerging technologies in concrete
- Field applications
- Fireproofing, fire-stopping and draft-stopping
- High strength concrete
- Identifying and differentiating new materials
- Inspection for the design professional
- Interpreting specifications for new materials
- Non-destructive testing
- Pre-stressed concrete
- Quality assurance
- Reinforced concrete
- Research and development in concrete materials
- Roller compacted concrete
- Self-consolidating concrete
- Shotcrete
- Soils and earthwork

- Special inspections
- Specialty building products
- Structural design
- Structural masonry
- Structural steel
- Structural welding
- Technical content of building codes and standards
- Working with customers

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.



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

# **Training Proposal for:**

# **Providence West Valley Healthcare Center, LLC**

# Contract Number: ET22-0164

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: M. Paccerelli

# PROJECT PROFILE

Contract Priority/Retrainee Attributes: Job Creation Initiative Medical Skills Training HUA Expansion Funds (Alt/Gen)		Industry Sector(s):	Services (G) Healthcare (62) Priority Industry: ⊠Yes □No	
Kern San Bernardino		Repeat Contractor:	🛛 Yes 🔲 No	
Union(s): 🗌 Yes 🖾 No				
Number of Employees in:		CA: 7,000	U.S.: 12,750	Worldwide: 12,750
<u>Turnover Rate</u> :		7%		
<u>Managers/Supervisors</u> : (% of total trainees)		0%		

# **FUNDING DETAIL**

In-Kind Contribution

\$666,804



# TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours		Average Cost per	
No.			Trainees	Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Continuous Imp.,	515	8-200	0	\$552	\$19.12
	Priority Rate Medical Skills Training	Computer Skills, MST Didatic, MST Preceptor		Weighted 24	•		
2	Retrainee	Continuous Imp.,	150	8-200	0	\$552	\$15.00**
	Priority Rate	Computer Skills, MST Didatic,		Weighted	d Avg.:		
	Medical Skills Training	MST Preceptor		24			
	HUA						
3	Retrainee	Continuous Imp.,	160	8-200	0	\$828	\$15.65
	Priority Rate	Computer Skills, MST Didatic,		Weighteo	d Avg.:		
	Job Creation Initiative	MST Preceptor		<u>3</u> 6	•		
	Medical Skills Training	•					

\*Post-Retention Wage is the Contractual Wage

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

# Minimum Wage by County:

Wage Range by Occupation				
Occupation Titles	Post-Retention Wage	Estimated # of		
	Range	Trainees		
JOB NUMBER 1:				
Registered Nurse		85		
Licensed Vocational Nurse		265		
Therapist		30		
Therapist Assistant		20		
Certified Nurse Assistant		115		

JOB NUMBER 2:				
Certified Nurse Assistant		150		
JOB NUMBER 3:				
Registered Nurse		25		
		15		
Licensed Vocational Nurse		20		
Cartified Nume Assistant		95		
Certified Nurse Assistant		5		

# INTRODUCTION

Founded in 2012, Providence West Valley Healthcare Center, LLC (PWV) (<u>www.westvalleyhc.com</u>) is a skilled nursing facility owned and managed by Providence Healthcare Center, LLC (Providence) based in Utah.

Providence owns and operates 50 skilled nursing care and assisted living facilities specializing in post-hospital, transitional care for sick, elderly, and infirm people in California. It offers nursing care; physical, occupational, and speech therapy; stroke and orthopedic rehabilitation; and assisted living, memory care, and behavioral health care services, as well as develops and implements various therapeutic recreational programs. Providence also provides an outpatient rehabilitation program, facilitates laboratory testing and X-ray, medication management, and audiology services.

There will be 12 Providence-owned facilities in California participating in this proposal with PWV as the contract holder. The 11 other facilities participating in this proposal are as follows:

- Bakersfieldidence Opco, LLC DBA Kern River Transitional Care in Bakersfield
- Del Rosa Villaidence Opco, LLC DBA Del Rosa Villa in San Bernardino
- El Cajon Post Acute, LLC DBA Country Hills Post Acute in El Cajon
- Fresno Valley SNF, LLC DBA Orchard Post Acute in Fresno
- Lindsay Gardensidence Opco, LLC DBA Lindsay Gardens Nursing & Rehab in Lindsay
- Ojai Healthidence Opco, LLC DBA Ojai Health & Rehabilitation in Ojai
- Orange Treeidence Opco, LLC DBA Riverwalk Post Acute in Riverside
- Valley Careidence Opco, LLC DBA Gateway Post Acute in Porterville
- Watermanidence Opco, LLC DBA Waterman Canyon Post Acute in San Bernardino
- West Valleyidence Opco, LLC DBA West Valley Post Acute in West Hills
- Westlake Oaks Healthcare, LLC DBA Sherwood Oaks Post Acute in Thousand Oaks

All these facilities are eligible for priority-industry funding as a Healthcare facility. The proposed funding will allow these facilities to train hire and train 160 new Registered Nurses (RN), Licensed Vocational Nurses (LVN), and Certified Nurse Assistant (CNA) in order to comply with the requirements of California SB 97, and provide new job skills to incumbent retrainees.

#### Veterans Program

The Company does not have a formal Veterans outreach program; however, all qualified Veteran candidates are encouraged to apply for positions through the normal company hiring policy.

#### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newlyhired employees will be subject to a lower post-retention wage. The Company is committed in hiring 160 new employees (Job Number 3).

With the passage of SB 97, the Company must expand its workforce and begin hiring and training new hires to meet the new compliance standards. These new employees are needed to support the company's increased level of patient care through expansion of staffing in its facilities and to meet the demands of increasing patients and acuity levels.

### PROJECT DETAILS

This will be PWV's third ETP Contract, and the third within the last five years. The proposed training differs from training delivered in the prior contracts. In the first contract, training focused on the new Centers for Medicare and Medicaid (CMS) five-star rating systems for skilled nursing providers. The second contract focused on the newly-created positions in two new skilled nursing facilities in San Rafael and Bakersfield, and a new sub-acute wing in the Ojai facility.

In the last few years, there has been a multitude of new state and federal regulations passed that are impacting the company's financial and operations significantly, including the passage of California SB9, and the three-year implementation of the Federal standards for Conditions of Participation. In 2021 alone, California has passed seven new laws affecting skilled nursing facilities that Providence must provide training to update staff on new standards and protocols.

The Company has also been challenged with implementing new processes and protocols to maintain the health and safety of its patients and employee with ongoing regulation changes. There has been an increased need for training to ensure that proper protocols are being maintained as healthcare organizations are still being inundated with the effects of COVID-19. ETP funding will help Providence cope with the wide ranging effects of the pandemic.

The COVID-19 pandemic has brought about several regulatory changes impacting infection control and patient safety at its facilities. Enhanced infection-control measures were put in place in each facility including training on the use of personal protective equipment, staff forums on infection control, face-to-face education sessions, and regular hand-hygiene compliance assessments. The Company's facilities also increased the use of personal protective equipment for healthcare workers performing aerosol-generating procedures like endotracheal intubation or open suctioning for all patients.

Providence has also struggled with maintaining its labor force due to the effects of the COVID-19 pandemic. With a shortage of skilled healthcare workers and unavailability of skilled workers with experience, ETP funds will allow Providence to hire and train relatively novice level nursing staff. The Company is seeking ETP support for this shortage layered with the continued uncertainty of the pandemic. Although some course titles may be similar as in prior projects, the Company confirmed that there is no duplication of training and the curriculum will cover new or updated procedures and processes.

#### **Training Plan**

**Computer Skills** - Training will be offered to all occupations in the use of recent electronic medical records updates to accurately enter and retrieve patient information regarding patient outcomes, and readmission prevention, and to help maximize reimbursement for patient care.

**Continuous Improvement** - Training will be offered to all occupations to foster improvement in multiple skills such as training for optimized patient safety, culturally appropriate care, personcentered care, new documentation standards, customer service; standard operating procedures, conflict resolution compliance, communication skills; interdisciplinary team skills and quality improvement.

**Medical Skills Training (Didactic and Clinical with Preceptor)** – Didactic training will be offered to all nurses and healthcare professionals to better understand advanced clinical processes to ensure competency and maximize patient satisfaction and safety. Clinical with Preceptor training will also be offered to Registered Nurses, Licensed Vocational Nurses, and Certified Nurse Assistant. Therapists and Therapy Assistants based on their respective job duties.

# 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

The company's Vice-President of Operations will oversee this project and will work with a central point person to head the program and communicate with the facilities. Each facility will utilize the Director of Staff Development (DSD) to manage the training program at their respective facility and submit the training rosters to the point person. A vendor has been retained to assist with administration and ensure that all training records meet ETP compliance. Training will begin upon ETP approval. A detailed training schedule is in place and will be delivered by in-house subject matter experts.

# High Unemployment Area

Trainees in Job Number 2 work in High Unemployment Areas (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in Bakersfield (Kern County), San Bernardino (San Bernardino County), Lindsay and Porterville (Tulare County), and El Cajon (San Diego County), and West Hills, and Thousand Oaks (Los Angeles County), are in HUA. 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. The company is requesting a 25% wage modification from the ETP Standard minimum wages of the aforementioned counties to the HUA minimum wage of \$15.00 per hour. Although employer provides health benefits, they will not be used in Job Number 2.

# PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term Approved Amount		Payment Earned \$%
ET19-0403	Ontario, San Rafael, Ojai, Porterville, San Bernardino, Riverside, West Hills, Bakersfield	03/04/19 - 03/03/21	\$618,904	\$544,975 (88%)
ET17-0394	Jurupa Valley, San Bernardino,	02/01/17 - 01/31/19	\$618,458	\$589,577 (95%)

Riverside, Ojai,	
Porterville,	
Lindsay, Ontario	

#### **DEVELOPMENT SERVICES**

The Company retained National Training Systems, Inc. (NTS) in Ladera Ranch to assist with development of this proposal for a flat fee of \$24,939.

# **ADMINISTRATIVE SERVICES**

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

### TRAINING VENDORS

N/A

# Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200

Trainees may receive any of the following:

#### **Computer Skills**

- Electronic Medical Records Application Skills/Updates
- Electronic Tablet for Bedside Charting
- Patient Services Billing Software

### Continuous Improvement Skills

- Administration
- Admissions planning
- Clinical Services System Management
- Communication Skills
- Continuous Quality Improvement Workshop
- Culturally Appropriate Care
- Customer Service
- Documentation
- Incident/Accident Management
- Interdepartmental Collaboration
- Interdisciplinary Team
- Medical Records
- Mobility Skills
- Optimizing Resident Safety
- Problem Analysis and Problem Solving
- Resident Centered Care
- Team Building

#### Medical Skills (Didactic)

- ABT Stewardship
- Advanced Cardiac Life Support
- Annual Skills Update
- Baseline Care
- Basic Life Support
- Behavior Management
- Body Mechanics
- Cardiac Conditions
- Care of the LBGT Patient
- Change of Condition Management
- Dementia/Alzheimer's
- Diabetic Management
- End of Life Care
- Enteral Feeding Tube Management
- Equipment Skills

- Facility Assessment
- Gastrointestinal System
- Incontinence Management
- Infection Control
- Infection Preventionist Training
- Interdisciplinary Team Process
- Intravenous Therapy
- Medication Administration Management
- Neurological Conditions
- Neurovascular System
- Pain Management (Acute and Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Patient Transfer Techniques
- Physical, Occupational, Speech Therapy
- Pro Act Training Professional Assault Crisis Training and Certification (Pro Act)
- Psychotropic Medication Management
- Reducing Psychotropic Drugs
- Resident and Family Education
- Resident Emergency Response
- Residents with Special Needs
- Respiratory Care
- Restorative Nursing Program
- Restraint and Restraint Reduction
- Skeletal/Orthopedic Conditions
- Skills Gap training
- Therapy Skills
- Urinary Management (foley catheter, input/output)
- Wound Management

#### Medical Skills (Preceptor)

- Inpatient & Outpatient Care Unit
- Activities of daily living
- Assessing of Tube-Fed Individuals with Diabetes Mellitus
- Assisting and performing self-care skills with patients; facilitating functional gains of each patient
- Assistive Devices
- Bowel and bladder training of patients
- Breathing patterns and respiratory function
- Cardiac Conditions
- Charting
- Clinical Skills Review
- Colostomy Care
- Conduct range of motion exercises with patient
- Dementia Care
- Dementia/Alzheimer's
- Enteral Management

- Equipment/Modalities
- Feeding Tube
- Functional mobility and ambulation
- Gastrointestinal Conditions
- Hazardous Waste Handling
- Identification of patient change in condition
- Identification of skin impairments and prevention
- Incontinence Management (colostomy care)
- Infection Control
- Infection Control
- Intravenous Therapy
- Isolation Techniques
- Managing Patients with Neurovascular Conditions
- Medication Management
- Monitor blood pressure of patients
- Monitoring of cardiovascular changes such as vital signs, endurance, level of consciousness
- Operate safety devices with patient
- Pain management
- Patient Assessment and Care
- Patient care of foot and hand
- Patient Safety
- Positioning of patients for correct body alignment
- Preventing and Identifying Complications Related to Tube Feedings
- Procedures for Temperature check for Hydrocollator/Paraffin
- Proper Use of Exercise Equipment
- Rehabilitation Services
- Residents with Special Needs
- Respiratory Care
- Safe Linen Handling
- Safe Patient Handling
- Skeletal/Orthopedic Conditions
- Therapeutic Activities
- Therapeutic Exercises
- Therapeutic Safety
- Use of the Call Light System
- Wound Management

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



**EXPANSION FUNDS** 

# **Training Proposal for:**

# **Quality Controlled Manufacturing, Inc.**

# Contract Number: ET22-0168

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

# PROJECT PROFILE

Contract Expansion Funds (Alt/Gen) Attributes: Retrainee SB <100 Priority Rate		Industry Sector(s):	Manufac	turing (E)	
				Priority Ir	ndustry: 🛛 Yes 🗌 No
Counties Served: San Diego			Repeat Contractor:	⊠ Yes □ No	
Union(s): 🗌 Yes 🖾 No					
Number of Employees in:		CA: 92	U.S.:92		Worldwide: 92
<u>Turnover Rate</u> :		17%			
<u>Managers/Supervisors</u> : (% of total trainees)		16%			

# FUNDING DETAIL

In-Kind Contribution	
\$102,960	

Total ETP Funding
\$91,080

### TRAINING PLAN TABLE

Job	Job Description		Estimated No. of	Rang Hou		Average	
No.	Job Description	Type of Training	Trainees	Class / Lab	CBT	Cost per Trainee	Wage*
1	Retrainee	Business Skills,	88	8-200	0	\$1,035	\$19.12
	SB <100 Priority Rate	Computer Skills, Cont. Improv., Mfg. Skills, PL - Mfg. Skills		Weighte 45	•		

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: \$19.12 per hour for San Diego County.
Health Benefits: 🛛 Yes 🗌 No This is employer share of cost for healthcare premiums –
medical, dental, vision.
Used to meet the Post-Retention Wage?: 🛛 Yes 🗌 No 🗌 Maybe

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

Wage Range by Occu		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Administration		2
		20
Production		26
		25
Engineering		3
Supervisor		1
Supervisor		13

#### **INTRODUCTION**

Quality Controlled Manufacturing, Inc. (QCMI) (<u>www.qcmfginc.com</u>) was founded in 1978 and is located in Santee. The Company manufactures parts, components, and complex assemblies and specializes in precision machining of all metals including exotic alloys. QCMI provides specific manufacturing services to the aerospace; space; power generation; oil and gas; marine; and heavy equipment industries and also to the Department of Defense (DOD) and Federal Aviation Administration (FAA).

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

#### Veterans Program

Although the Company does not have a separate Veteran Job Number, QCMI lists all job openings with CAL-Jobs, which provides priority recruitment to Veterans. The Company also works with Workshop for Warriors and NTVSI.org to help transitional Veterans gain employment in the civilian sector.

#### PROJECT DETAILS

This will be QCMI's fourth ETP Contract, and the third within the last five years. In the most recent ETP Contract QCMI provided training related to the continued growth of the Company, which was projected at 7% increase in its workforce. The Company was on track until March 2020 when the COVID-19 pandemic disrupted all sectors of employment. Training in the prior Contract provided Computer Skills, Continuous Improvement, and Manufacturing Skills training to meet a high level of quality assurance and adaptability for industry and individual customer requirements. The training also allowed QCMI to continue to support and manage its customer base and continue to do business during the pandemic.

In this Contract, training will address the need to support current and future business needs. Due to safety protocols and changes in business demand, trainees were not able to receive the productive lab required to gain the skillset needed for professional growth as some entry-level employees hired during the prior project had zero background in manufacturing skills. Training in this Contract will concentrate on providing this training, with an ongoing plan to provide skillsets needed to promote into machine operators, inspection and other manufacturing positions and support the increase in customer demand as businesses are recovering from the pandemic. This training will also address the succession plan needed to impart skills, knowledge and experience of long-term retiring employees who have industry knowledge crucial to the success of the Company. Additional training will include skills required by the Company's customer base including support and customer services; methods in Lean manufacturing principles; new compliance and regulation standards related to nondestructive testing, nonconventional machining; ISP 9001 and AS9100; and ITAR to improve manufacturing and process improvements.

Additionally, the Company will address industry changes in specialized manufacturing services for aerospace, industrial, heavy equipment, commercial, defense and power generation industries. QCMI invested over \$3.5M in a new machining cell. The Company purchased the equipment prior to the pandemic and was not able to train on it due to social distancing and other safety requirements. With return to work options and COVID-19 safety protocols in place, staff has returned to work, and the machine cell has been set up. QCMI needs to train and significantly upskill staff to operate and troubleshoot issues when using this new machine.

Although some curriculum topics are similar to those in prior ETP Contracts, the subject matter has been updated to address new standards and processes to ensure there is no duplication of training.

#### Training Plan

Training will be delivered via Class/Lab, E-Learning and Productive/Lab (PL) in the following:

**Business Skills**: Training will be offered to all occupations to develop skills and an understanding of the industry as it relates to business functions. Training will include Business Writing, Communication, Cost Analysis and Communication.

**Computer Skills** – Training will be offered to all occupations and include Microsoft Office, Enterprise Resource Planning (ERP), SolidWorks, MasterCam, Visual Fair, and Coordinate Measuring Machine (CMM) Programming.

**Continuous Improvement** – Training will be offered to all occupations and include skills in process improvement, Lean manufacturing and quality control techniques. Training topics include Six Sigma Green Belt, Lean Manufacturing, Quality Systems, Team Building, Leadership Skills, International Traffic in Arms Regulations (ITAR), Internal Auditor, and Quality Clinics.

**Manufacturing Skills** – Training will be offered to Production, Engineering and Supervisors on machine operations and customer specific requirements related to specific compliance. Topics include Blueprint Reading, Machine Set Up, Machine Operation, Shop Inspection, Non-Destructive Testing, and First Article Inspection.

#### Productive Laboratory (PL)

Trainees may produce goods for profit as part of the PL training. PL training will be provided in Manufacturing Skills to 40 Production staff trainees and will include Machine Set up, Machine Operation, and Manufactured Part Inspection. Training will be conducted on a 1:1 trainer-to-trainee ratio. PL instructors are subject matter experts with over ten years of experience in their respective occupations. Instructors providing PL training are dedicated to training delivery during all PL training hours, and the training will be documented indicating specific process and equipment operation knowledge.

PL training will allow trainees to successfully use various manufacturing equipment such as manual lathe and mill machines, CNC lathe and mill machines, inspection CMM machines, NDT Horizontal Magnaflux Wet bench, NDT Penetrant Station, manufacturing saws, grinders, conventional hone, WFL machine, and manufacturing RMI laser.

Production staff trainees will receive up to 24 hours of PL training. During PL, trainees will learn to set up and operate the machines, load materials, and complete entire processes from start to finish; as well as, verify that all processes/procedures are completed accurately. Trainers are responsible for providing instruction and immediate feedback to trainees while they perform the tasks assigned. Trainers will also monitor and test trainees to determine if they are able to set up and operate machines.

#### **Commitment to Training**

QCMI's annual training budget is approximately \$175K. Training includes new-hire onboarding and orientation, basic skills, COVID-19 prevention, standard operating procedures, compliance and mandated safety training.

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

> Training Infrastructure

Training is scheduled to begin upon Panel approval and will be delivered on-site by QCMI inhouse staff and training vendors if needed. QCMI designated its Human Resources Manager, who successfully managed the Company's prior ETP project, to continue the management and administration of this proposed Contract. The Manager will be responsible for scheduling training, enrolling trainees, and tracking training hours in the ETP management systems. The Company's Chief Operating Officer/Chief Financial Officer will oversee the overall administration of the ETP project.

#### PRIOR PROJECTS

The following table summarizes performances by QCMI under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0240	Santee	10/08/18 – 10/07/20	\$99,840	\$99,840 (100%)
ET17-0176	Santee	08/13/16 – 08/12/18	\$96,096	\$96,096 (100%)

# **DEVELOPMENT SERVICES**

N/A

# **ADMINISTRATIVE SERVICES**

N/A

# **TRAINING VENDORS**

To Be Determined

# Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200 Trainees may receive any of the following:

### **BUSINESS SKILLS**

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

#### COMPUTER SKILLS

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

### **CONTINUOUS IMPROVEMENT**

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

#### MANUFACTURING SKILLS

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

#### PL Hours

0 - 24

Trainees may receive any of the following:

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

- Machine Set Up
- Machine Operation
- Manufactured Part Inspection

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

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



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

# **Training Proposal for:**

# S Bravo Systems, Inc.

# Contract Number: ET22-0155

Panel Meeting of: November 19, 2021

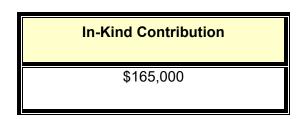
ETP Regional Office: North Hollywood

Analyst: J. Romero

# PROJECT PROFILE

Contract	Retrainee		Industry	Manufact	turing (E)
Attributes:	Attributes: Priority Rate		Sector(s):		0 ( )
	HUA				
	Expansion Fund	ds		Priority Ir	ndustry: 🛛Yes 🔲No
Counties Los Angeles			Repeat	🛛 Yes	
Served:			Contractor:		
Union(s): 🗌 Yes 🖾 No					
Number of Employees in:		CA: 113	U.S.: 113		Worldwide: 113
<u>Turnover Rate</u> :		14%			
Managers/Supervisors: (% of total trainees)		5%			

# FUNDING DETAIL



Total ETP Funding	
\$132,365	

# TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Rango Hou		Average Cost per	Post- Retention
No.			Trainees	Class / Lab	СВТ	Trainee	Wage*
1	Retrainee Priority Rate	Business Skills; Commercial Skills; Computer Skills; Cont. Improv.; HazMat; Mfg. Skills; PL-Mfg. Skills	72	8-200 Weighte 45	-	\$1,035	\$19.77
2	Retrainee Priority Rate HUA	Business Skills; Commercial Skills; Computer Skills; Cont. Improv.; HazMat; Mfg. Skills; PL-Mfg. Skills	27	8-200 Weighte 45	•	\$1,035	\$15.50
3	Retrainee Job Creation Initiative Priority Rate	Business Skills; Commercial Skills; Computer Skills; Cont. Improv.; HazMat; Mfg. Skills; PL-Mfg. Skills	20	8-200 Weighte 65	•	\$1,495	\$16.48

\*Post-Retention Wage is the Contractual Wage.

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

**Minimum Wage by County:** Job Number 1:19.77; Job Number 2: \$15.50 (HUA); and Job Number 3: \$16.48 (Job Creation) 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?: Set I No Set Maybe

Up to \$2.50 per hour may be used to meet the Post-Retention Wage in Job 1.

Up to \$0.98 per hour may be used to meet the Post-Retention Wage in Job 3 (Job Creation).

Wage Range by Occu	ipation	
Occupation Titles	Actual Wage Range	Estimated # of Trainees
JOB 1:		
		2
Administrative Staff		3
		2

Customer Service/Sales Staff3Customer Service/Sales Staff2Engineering2Production Staff21Production Staff12Shipping & Receiving Staff3Maintenance Mechanic1CNC Machinist3Welder6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff3JOB 3: Job Creation20Shipping & Receiving Staff3JOB 3: Job Creation15Maintenance Mechanic15Maintenance Mechanic20		
Engineering1Engineering2Production Staff21Production Staff12Shipping & Receiving Staff3Maintenance Mechanic1CNC Machinist1Welder3Driver6Driver1Manager/Supervisor3JOB 2: HUA3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation20Production Staff15Maintenance Mechanic21		3
Engineering2Production Staff21Production Staff12Shipping & Receiving Staff3Maintenance Mechanic1CNC Machinist1Welder3Driver6Driver1Manager/Supervisor3JOB 2: HUA3Customer Service/Sales Staff1Production Staff3JOB 3: Job Creation3JOB 3: Job Creation15Maintenance Mechanic15	Customer Service/Sales Staff	2
Production Staff21Production Staff12Shipping & Receiving Staff3Maintenance Mechanic1CNC Machinist1CNC Machinist1Welder6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation15Production Staff15Maintenance Mechanic20		1
Production Staff12Shipping & Receiving Staff3Maintenance Mechanic1CNC Machinist3Welder3Driver6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff3JOB 3: Job Creation3JOB 3: Job Creation15Maintenance Mechanic20	Engineering	2
12Shipping & Receiving Staff3Maintenance Mechanic1CNC Machinist3CNC Machinist1Welder6Driver6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff3JOB 3: Job Creation3Production Staff3JOB 3: Job Creation15Maintenance Mechanic2	Production Staff	21
Shipping & Receiving Staff3Maintenance Mechanic1CNC Machinist3Welder6Driver6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff3JOB 3: Job Creation3Production Staff3Job 3: Job Creation15Maintenance Mechanic20		12
Maintenance Mechanic1CNC Machinist3Welder3Driver6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff3JOB 3: Job Creation3Production Staff3Job 3: Job Creation15Maintenance Mechanic2	Shipping & Dessiving Staff	3
CNC Machinist3Welder1Welder6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation15Maintenance Mechanic2	Shipping & Receiving Stan	3
CNC Machinist1Welder6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation15Maintenance Mechanic2	Maintenance Mechanic	1
Welder1Welder6Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation15Maintenance Mechanic2	CNC Machinist	3
Driver1Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation3Production Staff15Maintenance Mechanic2		1
Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation15Production Staff20	Welder	6
Manager/Supervisor3JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation15Production Staff20	Driver	1
JOB 2: HUA3Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation15Production Staff20	Managar/Supan/jaar	3
Administrative Staff3Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation1Production Staff15Maintenance Mechanic2		3
Customer Service/Sales Staff1Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation1Production Staff15Maintenance Mechanic2	JOB 2: HUA	
Production Staff20Shipping & Receiving Staff3JOB 3: Job Creation1Production Staff15Maintenance Mechanic2	Administrative Staff	3
Shipping & Receiving Staff3JOB 3: Job Creation1Production Staff15Maintenance Mechanic2	Customer Service/Sales Staff	1
JOB 3: Job Creation15Production Staff15Maintenance Mechanic2	Production Staff	20
Production Staff15Maintenance Mechanic2	Shipping & Receiving Staff	3
Maintenance Mechanic 2	JOB 3: Job Creation	
	Production Staff	15
Welder 3	Maintenance Mechanic	2
	Welder	3

# **INTRODUCTION**

Founded in 1988, and headquartered in the city of Commerce, S. Bravo Systems, Inc. (www.sbravo.com), (Bravo Systems) is a certified woman owned company that manufactures high-performance secondary containment systems or sumps for the petroleum equipment industry. Its products serve as reservoirs that aid in cleaning accumulated water, serve as safe reservoirs when pouring additives, and conceals equipment such as heaters, protein skimmers and monitoring probes away from the display tank. Bravo Systems manufactures both single and double wall containment sumps made from either steel or fiberglass such as dispenser sumps, tank or turbine sumps, transition sumps, and above-ground or marina sumps. The product line also includes Dispenser Conversion Frame, F-Series FRP entry fittings, retrofit FRP tank sump covers and entry fittings, Double Wall FRP spill buckets and swivel adapters.

Bravo Systems' headquarters and manufacturing plant is located in the city of Commerce in Los Angeles County, which is considered as a high unemployment area (HUA). In this proposal, Bravo Systems will train 119 incumbent and newly hired employees, in which 27 of the trainee population (Job Number 2) will avail the HUA wages.

#### Veterans Program

Bravo Systems does not currently have a specific Veterans recruitment program in place; however, several long-time employees are Veterans.

### PROJECT DETAILS

This is Bravo Systems' second ETP contract, the second in the last five years. In its prior ETP projects, Bravo Systems successfully accomplished its expansion by training staff in several areas of Continuous Improvement and Manufacturing Skills.

Under this proposal, Bravo Systems will train employees in various skills to support the launch and development of two new products, implement new processes and installing new equipment. The Company is adding Total Transfer Pump and Next Series to its product line which are rechargeable, explosion-proof pumping unit used in pumping fuel and water from containment systems; and injection-molded, rigid plastic entry fittings for tanks and containment systems.

In addition, Bravo Systems is introducing two new processes to replace its present chopping process for parts used in manufacturing namely, Resin Transfer Molding and Infusion Molding which are both used for drawing resin into glass reinforcement and installing new equipment for these new processes. Bravo Systems is also launching an additional production line for its new products. These changes will require extensive training to master equipment operation and the processes in order to produce sturdy, accurate parts and fittings that are reliable and durable.

#### Commitment to Training

Bravo Systems spends approximately \$35,000 annually for training. Courses include new hire orientation, mandatory training, and in-service medical skills training. Training delivered in the past has been both company-wide and job specific. The Company is committed to training its employees upon completion of the ETP program. Training will continue to be offered to employees to ensure job competency within the Company.

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

Bravo Systems has a training plan in place and is ready to start training upon approval. The National Sales Manager and the Process Improvement Manager will oversee the ETP Training and will work closely with the Human Resources Generalist and a third party administrative consultant in the administration of the ETP project. The team of three will schedule and provide the training for all employees to ensure full documentation of training obtained. Trainers will be a combination of in-house experts and vendors as needed. The Company has retained an outside administrative consultant to ensure that training administration and documentation procedures adhere to ETP requirements.

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.

#### High Unemployment Area

Some trainees work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in Los Angeles County are in an HUA.

#### Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. The Company is requesting a wage modification for 27 employees (Job Number 2).

#### **Retrainee - Job Creation**

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

The Company will hire 20 new employees (Job Number 3). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Bravo Systems' product expansion entails hiring new employees to support its additional product line to accommodate more production. These new positions are production, maintenance mechanic and welder positions.

#### **Productive Laboratory**

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training. Bravo Systems is rolling out new fabrication processes (Resin Transfer Molding and Infusion Molding. In order to produce higher quality parts with higher structural integrity, 25 employees who are in occupations production staff and maintenance mechanics will be trained for a total of 10 hours each. These are completely new processes of Bravo Systems and training is crucial in order to ensure competency of employees to yield quality products. Trainees will be trained in the proper use of injection molds and related compression devices and pumps used in creating the products and provide maintenance and repairs. Some equipment needs two employees to operate equipment and training ratio is 1:2.

#### **Training Plan**

All training will be delivered in a class/lab, video conferencing, of virtual learning setting.

**Business Skills**: This training will be offered to administration, customer service/sales staff, production staff, managers and supervisors. This training will focus primarily on product knowledge and new processes, account development in order to insure that the supply chain management is seamless and timely. In addition, training on effective communications will raise the level of concise and accurate information being offered to customers, vendors, and internal departments. Production math will also be taught to all trainees to establish a baseline of math skills in order to provide accurate production paperwork, invoices, and customer orders which will increase and efficiencies across departments as the level of accuracy rises.

**Commercial Skills**: This training will be offered to welders, CNC machinist and production staff. These occupations will gain skills in various phases of production such as material fabrication, welding, deburring/grinding and CNC operations and become competent in producing high quality products particularly with fuel containment systems to ensure its structural integrity and pass safety and quality inspection.

**Computer Skills**: This training will be offered to engineering, manager/supervisor and CNC operator and select production staff. Skills gained from this training will increase proficiency and

competency in utilizing equipment requiring computer applications and assist in data interpretation necessary in the process of developing and manufacturing products.

**Continuous Improvement**: This training will be offered all occupations. Skills gained from this training will provide standardization of processes, increasing quality standard, consistency in handling tools and equipment, and support growth and promotion within the Company. The second phase of LEAN principles will be provided to employees to enable them to apply theories gained from prior training to the actual process of manufacturing. Employees working in shipping/receiving and production department will receive training in the use of various materials handling equipment such as pallet jack, forklift and man-lift operation. Training will demonstrate safe start up and shutdown, safe operation of forks, operating on uneven ground, incline, decline, safe loading practices. Leadership and Supervisory Skills Training will provide effective supervisory and administrative skills in dealing with manpower hours, facilitating employee requests, work scheduling, preparing work order and budgets to achieve a high-performance workplace.

**Manufacturing Skills**: This training will be offered to productions staff, CNC machinist, welder, engineering, maintenance mechanics and manager/supervisor. Employees will be trained in various manufacturing process on new products developed by Bravo Systems such as Resin Transfer Molding (RTM) and Infusion Process, equipment operation training and materials handling equipment training. Skills gained from these training will establish employee competence and efficiency in performing their job duties.

**Hazardous Materials** This training will be offered to production staff, maintenance mechanics, and shipping/receiving staff. The course will teach proper handling and transport of hazardous materials.

**Productive Lab – Manufacturing Skills** training will be given to 25 production trainees for 10 hours of training to familiarize them with the new Infusion Molding and Resin Transfer Molding processes.

# PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

ET19-0346 Los Angeles 12/10/18 – \$135,590 \$110,898 (82%)	Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
12/00/20	ET19-0346	Los Angeles	12/10/18 — 12/09/20	\$135,590	\$110,898 (82%)

Paid to date: \$110,898.25; Earned approved \$52,846, Unearned \$58,052.25

#### DEVELOPMENT SERVICES

The Company retained Strategic Business Solutions in Visalia to assist with development of this proposal for a flat fee of \$7,250.

#### ADMINISTRATIVE SERVICES

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

# TRAINING VENDORS

To Be Determined.

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8 - 200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Account Development Training
- Purchasing Best Practices (APICS)
- Effective Communications
- Production Math

### **COMMERCIAL SKILLS**

- Material Fabrication
- CNC Operations
- Grinding and Deburring
- Commercial Grade Welding

#### **COMPUTER SKILLS**

- Auto CAD/CAD 3D Training
- Microsoft Applications

#### **CONTINUOUS IMPROVEMENT**

- Teambuilding
- LEAN Processes
- Leadership training
- Supervisors Skills Training
- Coaching and Mentoring
- Quality Control Processes
- Working in Confined Spaces with Combustible Dust
- Forklift/Man-lift and Pallet Jack Training

#### HAZARDOUS MATERIALS

• HAZMAT Training

#### **MANUFACTURING SKILLS**

- Resin Transfer molding
- Infusion Process
- Production Equipment Training
- Materials Handling Equipment Training

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

#### **Productive Lab Hours**

0-10

#### PL Manufacturing Skills

- Resin Transfer Molding (1:2)
- Infusion Molding (1:2)

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



# **EXPANSION FUNDS**

# **Training Proposal for:**

# S. Martinelli & Company

# Contract Number: ET22-0170

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: C. Kaiser

# PROJECT PROFILE

Contract Priority Rate Attributes: Retrainee			Industry Sector(s):	Manufact	turing (E)
	Veterans				
Expansion Fund		ds (Alt/Gen)		Priority Ir	ndustry: 🖾Yes 🗌No
Counties Served: Santa Cruz			Repeat Contractor:	🛛 Yes	🗌 No
Union(s): 🛛 Yes 🗌 No		Teamsters Loo	cal 853		
Number of Employees in:		CA: 335	U.S.: 342		Worldwide: 342
<u>Turnover Rate</u> :		9%			
Managers/Supervisors: (% of total trainees)		3%			

# **FUNDING DETAIL**

In-Kind	
\$226,233	

Total ETP Funding
\$197,846

# TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class /		Average Cost per Trainee	
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, Management Skills, Manufacturing Skills	249	Lab 8-200 Weighte 34	-	\$782	\$19.12
2	Retrainee Priority Rate Veterans	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, Management Skills, Manufacturing Skills	4	8-200 Weighte 34	•	\$782	\$20.00

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Numbers 1 and 2: \$19.12 per hour for Santa Cruz 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	Actual Wage Range	Estimated # of Trainees		
Job Number 1 (Retrainee)				
Accounting Stoff		2		
Accounting Staff		8		
Administrative Staff		7		
		16		
Apple Department Staff		6		
Forklift Operators		21		
General Labor Staff		36		
		3		

Human Resources	 1
	5
Leads	5
	3
	7
Machine Operators	46
	3
	4
Maintenance Staff	1
	17
Material Handlers	6
Part and Stockroom Staff	1
	3
Production Supervisors	11
Quality Assurance Staff	6
Quality Assurance Staff	4
Reliever Staff	7
	3
Shipping and Receiving Staff	8
Utility Staff	9
Job Number 2 (Veterans)	
General Labor Staff	1
Machine Operators	1
Maintenance Staff	2

# INTRODUCTION

Founded in 1868 and headquartered in Watsonville, S. Martinelli & Company (Martinelli's) (<u>www.martinellis.com</u>) markets and manufactures apple-flavored beverages such as apple cider, apple juice, and mulling spices. Martinelli's customers include large grocery retail chains such as Target, Costco Wholesale, BevMo, Sam's Club, WinCo Foods, and many more. Training will take place at the Company's Watsonville facilities. This is Martinelli's second ETP Contract and the second in the last five years.

# Veterans Program

In this proposal, Martinelli's will be training four Veterans (Job Number 2). The Company encourages veterans to apply for position openings. Positions are posted and collectivebargaining agreement (CBA) employees can test / bid for the position if it consists of a higher classified role. If this process is unsuccessful, the position is also posted externally on the Company's recruitment site.

#### Union Support

Apple Department Staff, Forklift Operators, General Labor Staff, Leads, Machine Operators, Maintenance Staff, Material Handlers, Reliever Staff, Shipping and Receiving Staff, and Utility Staff are represented by Teamsters Local 853. The union has submitted a letter of support for this training project.

### PROJECT DETAILS

In its prior Contract, Martinelli's focused on training the production employees on new machinery. For this proposal, Martinelli's will focus on a new Enterprise Resource Planning (ERP) software and new bottling line equipment.

The new ERP software, Alchemy, integrates and improves the management of core business processes and procedures. This allows for employees to plan, schedule, and adjust business processes along with offering training videos for all employees. The software will be installed by the end of the fourth quarter in 2021. The Company will also train employees on a Computer Maintenance Management System (CMMS) and on PECO, a quality control system. CMMS software provides inventory tracking and PECO software ensures the product is up to consumer standards. Training will be provided to all occupations and provides the necessary skills to navigate the system to perform their job duties. Training will ensure Martinelli's and all employees can continue to provide quality service.

In addition, Martinelli's will be opening additional bottling production lines and introducing new Laser Coder equipment to improve the bottling process. The Company will train employees extensively on the equipment and new processes. Training will provide employees operational and process improvement skills training to be efficient and productive.

Martinelli's will also provide cross training in multiple areas of the business to empower, develop, and encourage all employees to continue learning and growing within the company.

#### Training Plan

Training will be delivered via Class/Lab, E-Learning, and Computer Based Training delivery methods. In-house subject matter experts and vendors may be utilized to deliver training in the following:

**Business Skills**: Training will be offered to all occupations. Training will provide the skills to effectively and efficiently maintain business operations. Training topics include Budgeting and Finance, Regulatory Compliance, and Communication Skills.

**Computer Skills**: Training will be offered to all occupations. Training will focus on software for tracking goods, purchase orders, and internal software. Training topics include Alchemy, Visio, and Computer Maintenance Management System (CMMS).

**Continuous Improvement**: Training will be offered to all occupations. Training will focus on eliminating waste and improving processes. Training topics include Compliance Management and Assessment Training.

**Hazardous Materials:** Training will be offered to all occupations. Training will focus on developing knowledge of proper use, disposal, and cleanup of hazardous materials. Training topics include Environmental Cleaning and Disinfecting and Wastewater Training Process.

**Management Skills**: Training will be offered to Leads and Production Supervisors. Training will focus on effective leadership, and promoting a positive work environment. Training topics include Effective Leadership Training.

**Manufacturing Skills**: Training will be offered to Apple Department Staff, Forklift Operators, General Labor Staff, Leads, Machine Operators, Maintenance Staff, Material Handlers, Part and Stockroom Staff, Production Supervisors, Quality Assurance Staff, Reliever Staff, Shipping and Receiving Staff, and Utility Staff. Training will focus on production, bottling, and plant services. Training topics include Labeling, Filling, and Equipment Operations.

#### Commitment to Training

Martinelli's annual-training budget in California is approximately \$150,000. The Company currently funds all training on government-mandated safety regulations, new-hire orientation, and rudimentary job skills. Training is an ongoing initiative so Martinelli's will continue to train employees after completion of ETP training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

ETP funds will 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

Martinelli's Senior Human Resources Generalist, Human Resources Coordinator, and Safety/Training Specialist will oversee all ETP-funded training. In addition, four staff members and plant leadership including the Plant Manager will help with scheduling and training coverage.

#### Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0-5 hours of CBT.

#### **Green/Clean Operations**

Martinelli's successfully met the standards of the Green Business Program via the City of Watsonville Program and exceeded the regulatory requirements to prevent pollution, reduce waste, conserve energy, and save water. The certification was granted to Martinelli's in January 2020.

#### Impact/Outcome

As part of training, Martinelli's offers certifications for courses such as SQF Training and Martinelli's CORE training. All certificates earned will be transferable.

# ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET20-0334	\$83,122	5/26/2020 – 5/25/2022	139	0	0

Based on ETP Systems, 3628 reimbursable hours have been tracked for potential earnings of \$83,446.30 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to and in progress through May 2022.

# **DEVELOPMENT SERVICES**

N/A

# **ADMINISTRATIVE SERVICES**

N/A

# **TRAINING VENDORS**

To Be Determined

### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Adaptive Training
- Budgeting and Finance
- Business Writing
- Communication Skills
- Concur Training
- Customer Service
- Finance 101
- Financial Acumen for the Non-Financial Manager
- Laws and Regulations (Local State Federal)
- Leadership Skills
- Payroll Compliance
- Powerful Presentations
- Problem Solving Decision
- Professional Development
- Regulatory Compliance
- Team Building
- Time Management

#### **COMPUTER SKILLS**

- Alchemy
- Android
- Computer Maintenance Management System (CMMS)
- iOS
- Microsoft Office (Intermediate and Advanced)
- PECO Software
- Systems Applications and Products (SAP)
- SharePoint
- Teams
- VideoJet Printer
- Visio
- Zoom

#### **CONTINUOUS IMPROVEMENT**

- Assessment Training
- Compliance Management
- Confine Space
- CORE Training
- Environmental Awareness and Safety
- Equipment Operations
- Project Management Smart Sheets
- Risk Assessment
- Scheduling

#### HAZARDOUS MATERIALS

- Ammonia Process in Manufacturing
- Environmental Cleaning and Disinfecting
- Hazardous Communication (HazCom)
- Personal Protective Equipment
- Wastewater Training Process

#### MANAGEMENT SKILLS (management trainees only)

• Effective Leadership Training

#### MANUFACTURING SKILLS

- Blending
- Bottle Dosing and Filing
- Equipment Maintenance
- Equipment Operations
- Filing
- Forklift Training
- Labeling
- Laser Coder
- LEAN Manufacturing.
- Packaging
- Safe Quality Food (SQF)
- Shipping and Receiving
- Weighing

#### **CBT Hours**

0 – 5

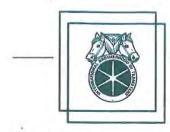
#### **CONTINUOUS IMPROVEMENT**

- Facility Operations Procedures 2 hours
- Food Defense

- 1 hour
- Respect in the Workplace 2 hours

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

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



# **TEAMSTERS LOCAL 853**

AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS & TEAMSTERS' JOINT COUNCIL #7

7750 PARDEE LANE • OAKLAND, CALIFORNIA 94621-1497 TELEPHONE: (510) 895-8853 • (800) 400-1250 • FAX: (510) 895-6853 1452 N. Fourth Street • San Jose, CA 95112 • (408) 453-0287 • Fax: (408) 453-2034 22 East Fifth Street • Watsonville, CA 95076 • (831) 724-0683 • Fax: (831) 724-1554 email: connections@teamsters853.org

October 20, 2021

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand S. Martinelli is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project:

Occupations	Number per Occupation	Union CBA Y/N	
Apple Department Staff	6	Y	
	0		
Forklift Operators	21	Y	
	0		
General Labor Staff	36	Y	
(1 Veteran)	4		
	0		
Leads	5	Y	
	3		
Machine Operators	7	Y	
(1 Veteran)	47		
	3		
Maintenance Staff	4	Y	
(2 Veterans)	3		
	17	1	
Material Handlers	6	Y	
Reliever Staff	7	Y	
	3		
Shipping and Receiving Staff	8	Y	
	0		
Utility Staff	9	Y	
	0		2

Representing Members in Warehousing, Dairy, Liquor, Bakery, Construction, Building Materials, Newspaper, Concession, Retail Delivery, Automotive, Retail, Graphic Communications, Package Delivery, and Miscellaneous Industries

Rome A. Aloise Principal Officer Secretary-Treasurer

Dennis Hart President

Lou Valletta Vice President

Stu Helfer Recording Secretary

Stacy Murphy Trustee

Joel Bellison Trustee

Mike Fritz Trustee

Oakland Office

#### Jesse Casqueiro

. .

Bo Morgan
Scott Gonsalves
John Arnolfo

Dan Harrington

Lon Schmidt

Efren Alarcon

Lennie Kuhls

Jonathan Pinney

Bob Galves Steve Beck

Tracy Kelley

Mike Henneberry

San Jose Office

Jerry Sweeney

**Ray Torres** 

Pablo Barrera

Jerry Cordova

Johnny Gallegos

Eddie Venancio

Watsonville Office

Steven Lua

Santos Lerma, Jr.

Brad Sebring

BCC/BT 847-M

#### Exhibit E

The Union with respective Teamsters Local 853 has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers of S. Martinelli & Co. during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely,

Stevertug

Steven Lua Director Of Business Relations Teamsters Local 853



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

# **Training Proposal for:**

# Safran Passenger Innovations LLC

# Contract Number: ET21-0138

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: C. Clady

# PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Priority Rate Retrainee Job Creation Initiative		Industry Sector(s):	Other (J) Manufact	turing (33)
				Priority Industry: ⊠Yes □No	
Counties Served:	Orange		Repeat Contractor:	⊠Yes □No	
Union(s): 🗌 Yes 🖾 No					
Number of	Employees in:	CA: 304	U.S.: 304		Worldwide: 76,000
Turnover Rate: 21%		21%	See Project	Details	
Managers/Supervisors: (% of total trainees)20%		20%			

# **FUNDING DETAIL**

\$225,000

Total ETP Funding	
\$199,410	

# TRAINING PLAN TABLE

Job	OD Iob Description Type of Training		Estimated No. of	Range of Hours		Average Cost per	
No.			Trainees	Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Business Skills Continuous	245	8-200	0	\$782	\$19.12
	Priority Rate	Improvement Computer Skills Mfg. Skills PL-Mfg. Skills		Weightee 34	•		
2	Job Creation Retrainee Priority Rate	Business Skills Continuous Improvement Computer Skills Mfg. Skills PL-Mfg. Skills	10	8-200 Weighte 34	•	\$782	\$16.30

Minimum Wage by County: Job Number 1 - \$19.12/hr. for Orange County; Job Number 2 (Job
Creation) - \$15.93/hr. for Orange County.
Health Benefits: Xes 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 \$2.47 per hour may be used for Job 1 to meet the Post-Retention Wage.

Wage Range by Occupation					
Occupation Titles	Wage Range	Estimated # of Trainees			
Job Number 1					
Administrative Staff		15			
		10			
Customer Service Staff		15			
		5			
Managers/Supervisors/Directors		30			
Engineers		35			
IT Staff		35			
		35			
Production Workers		20			
		10			
Technical Support Staff		20			

	10
	5
Job Number 2	
Administrative Staff	1
Engineers	1
Managers/Supervisors	1
Production Worker	6
Technical Support Staff	1

# **INTRODUCTION**

Safran Passenger Innovations LLC (Safran) is a wholly-owned subsidiary of Safran S.A. Safran Passenger Innovations, LLC (formerly Zodiac Inflight Innovations). Founded in 1996 in Paris France, and now headquartered in Brea, CA (Orange County). Safran is committed to developing innovative, intuitive, and trusted In-Flight Entertainment (IFE) systems designed to exceed passenger expectations for a truly unique entertainment experience during commercial air travel. Safran designs software, builds the screens, and replaces in-flight entertainment systems for premier airlines to give an ultimate entertainment experience. Its flagship product is the "RAVE" system. This "seat-centric" in-flight entertainment system is one of the most advanced products in the marketplace. Ultra Sleek lightweight 4K displays with Bluetooth audio for the entire cabin to enjoy.

Safran's Customers include Emirates, ANA, Boeing, Airbus, Lufthansa, Philippine Airline, SAS, Air France, and other premium airlines. Brea is the only Safran location, therefore, the only location participating in training. This is Safran second ETP contract in the last three years.

#### Veterans Program

The Company does not have a specific program for recruiting and hiring Veterans, however, they work with Direct Employers which posts all jobs on Veteran specific Job Boards. Veterans are encouraged to apply for all positions in which they are qualified. Safran currently has 16 Veterans in its employ.

A portion of the Veteran population participating in this project may include transitioning active duty Veterans within one year of their anticipated separation from service.

# PROJECT DETAILS

Demand for products slowed during the Covid-19 pandemic. However, now that air travel is making a come back, the demand for In- Flight Entertainment (IFE) systems has increased. In addition, products have become more sophisticated.

The previous ETP contract served as a foundation to improve production quality. This Contract will focus on Passenger Innovations to design new and improved In-flight Entertainment Systems. This is new technology to the Company, therefore, incumbent workers will need to learn to design, program, and maintain new cost efficient hardware and software products that are reliable in-flight.

ETP-funded training will enable the Company to achieve these goals, as well as reduce waste, reduce repair reworks, improve on-time delivery time and increase profitability.

#### **Director occupation**

Although the job title "Director" is included in occupational titles, these are frontline workers who do not set company policy. They function at a managerial level consistent with ETP policy on frontline workers.

#### **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.

Safran has committed to hiring at least 10 new employees (Job Number 2) during the term of the Contract. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

By expanding its existing production capacity, Safran's business is expected to grow over the next two years. New hires need to be trained to design, program and support in-flight Entertainment Systems. The Company will train and employ these workers at the Brea facility, which has ample space to accommodate these new employees.

#### Training Plan

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

**Business Skills**: All occupations will receive training Business Processes, Communication Skills, Conflict Management, Customer Service and Sales Skills, Goal Setting, In-Flight Entertainment Systems, Product Knowledge, and Project Management. This training will result in increased customer satisfaction and sales.

**Computer Skills**: Training will be offered to all employees. Training will include Computer Networking, Cyber Security, Engineering Software Applications, In-Flight Software Applications, Inventory Management Software, MS Office (Intermediate and Advanced), Software Applications, Software Development, and Web-based Computer Applications. Improved computer skills will result in reduced errors, more on-time deliveries, and reduced operating costs.

**Continuous Improvement:** All company employees will participate in the Continuous Improvement effort. Employees will receive training in Best Manufacturing Practices, Coaching/Counseling/Motivation Techniques, Leadership Skills, Lean Manufacturing, Operating Procedures, Product Safety and Reliability, Safe and Reliable In-Flight Systems, Standard Work Instructions, and Team Problem Solving. Continuous Improvement training will improve operating efficiency and reduce costs.

**Manufacturing Skills:** Production Workers and Technical Support Staff will be learning Assembly Procedures, Covid-19 Procedures, Engineering and Design Procedures, Equipment Cross-Training, Equipment Maintenance/Repair Skills, Inspection Equipment, Maintenance Procedures, Manufacturing Techniques, Product Design & Development, Quality Control, Repair Station Procedures, Resolving Production Problems, Standard Operating Procedures, Testing Materials and Equipment, and Tools and Processes.

**Productive Lab – Manufacturing Skills:** Production Workers and Technical Support Staff will receive approximately 60 hours of training on Assembly Procedures, Engineering Systems, Inspection Procedures, Production Assembly and Equipment Repair, Standard Operating Procedures, and Technical Tools.

Training will be provided by in-house trainers/production supervisors responsible for instruction and providing immediate feedback to the trainee as work is performed.

PL training is the most effective way to teach and learn the necessary skills. PL will not exceed 60 hours per-trainee. The trainer to trainee ratio will be no more than 1:3. Most production workers will have minimal opportunity to leave the production area and attend class, therefore, may receive a low number of classroom hours. As such, needs the opportunity to receive training via PL.

This training cannot be duplicated in a class or simulated lab environment. Learning to do the required jobs requires the actual hands-on operation of the equipment. This equipment is only available on the production floor. Learning these skills requires "craftsman" like knowledge.

#### Turnover rate

The ETP program is designed to fund training for stable, secure jobs. Thus, the employer's turnover rate cannot exceed 20% annually for the facility where training is requested. But the Panel may accept a higher turnover with evidence training will significantly decrease the turnover, or the employer experienced a singular reduction in workforce, or industry data supports a higher turnover rate. The Panel may, or may not choose to, impose a "turnover penalty" when the company crosses this 20% threshold.

If the Panel chooses to impose a turnover penalty, failure to stay under a maximum rate will trigger forfeiture of 25% of the amount earned for each trainee. The maximum rate is typically 20%, as measured by turnover during the 12-month period preceding termination of the ETP Contract.

Although turnover rate exceeds 20% annually as included in section 4417 this proposal does not impose a turnover penalty, as the turnover rate was primarily due to the pandemic.

#### Commitment to Training

The Company's annual training budget is \$187,000 and includes new-hired orientation. Currently, Safran provides a new-hire orientation, OSHA mandated training, sexual harassment prevention training, and first aid training. The Company has an on-the-job training program for manufacturing skills. MS Office (Basic level) is provided on an as-needed basis.

In the past, the Company has provided a new-hire orientation, mandated training, and an introductory level of manufacturing-based skilled 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

Safran has designated a team of staff that includes the Vice President of Human Resources, a Human Resource assistant, and Managers/Supervisors to oversee the ETP training and administrative responsibilities. The Company has retained an administrative contractor to assist in administration.

There will be 20 trainers who will provide training. Trainers consist of Leads, Managers, Supervisors, and individuals who are subject matter content experts. There are a total of 22 staff supporting the program.

The Human Resource assistant will collect rosters. The rosters will be transmitted to the administrative contractor.

#### PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0106	Brea	7/1/2018 - 6/30/2020	\$99,840	\$99,840 (100%)

### DEVELOPMENT SERVICES

The Company retained National Training Company in Irvine to assist with development of this proposal for a flat fee of \$10,000.00

#### ADMINISTRATIVE SERVICES

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

#### TRAINING VENDORS

To Be Determined

#### Exhibit B: Menu Curriculum

Trainees may receive any of the following:

#### Class/Lab/E-Learning Hours

8-200

#### CONTINUOUS IMPROVEMENT

- Best Manufacturing Practices
- Coaching/Counseling/Motivation Techniques
- Leadership Skills
- Lean Manufacturing
- Operating Procedures
- Product Safety and Reliability
- Safe and Reliable In-Flight Systems
- Standard Work Instructions
- Team Problem Solving

#### COMPUTER SKILLS

- 4K Displays
- Bluetooth
- Computer Networking
- Cyber Security
- Digital Rights Management
- Engineering Software Applications
- Graphic User Interface
- In-Flight Software Applications
- Inventory Management Software
- MS Office (Intermediate and Advanced)
- Software Applications
- Software Development
- Web-based Computer Applications

#### MANUFACTURING SKILLS

- Assembly Procedures
- Covid-19 Procedures
- Engineering and Design Procedures
- Equipment Cross-Training
- Equipment Maintenance/Repair Skills
- Inspection Equipment
- Maintenance Procedures
- Manufacturing Techniques
- Product Design & Development
- Quality Control
- Repair Station Procedures
- Resolving Production Problems
- Standard Operating Procedures

- Testing Materials and Equipment
- Tools and Processes

#### **BUSINESS SKILLS**

- Business Processes
- Communication Skills
- Conflict Management
- Customer Service and Sales Skills
- Goal Setting
- In-Flight Entertainment Systems
- Product Knowledge
- Project Management

#### <u>PL Hours</u> 0 - 60

# PL-Manufacturing (limited ratio 1:5)

- Assembly Procedures
- Engineering Systems
- Inspection Procedures
- Production Assembly and Equipment Repair
- Standard Operating Procedures
- Technical Tools

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



# **EXPANSION FUNDS**

# **Training Proposal for:**

# Santa Clara County Electrical Joint Apprenticeship and Training

# Trust

# Contract Number: ET22-0937

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

# PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Apprenticeship	Industry Sector(s):	Construction (C)
	Priority Rate		
	Retrainee		
	Veterans		Priority Industry: 🛛 Yes 🗌 No
Counties	· · · · · · · · · · · · · · · · · · ·	Repeat	
Served:	Santa Clara	Contractor:	⊠ Yes □ No
Union(s): Yes No International Brotherhood of Electrical Workers Local 332			
Turnover R	late:	≤20%	
Managers/Supervisors: (% of total trainees) N/A			

# **FUNDING DETAIL**

Program Costs +		Support Costs	=	Total ETP Funding
\$555,336		\$41,256 Jobs 1 & 2: 8% Job 3: 20%		\$596,592
In-Kind Contribution:	50% of	Total ETP Funding Required Inherent		

# TRAINING PLAN TABLE

Job No.	IOD Description	Type of Training	Estimated No. of	Range of Hours Class / CBT		Average Cost per	Post- Retention
			Trainees	Lab	СЫ	Trainee	Wage*
1	Retrainee	Business Skills,	27	8–200	0	\$590	\$40.25
	Journeyworker	Comm'l. Skills, Computer Skills,		Weighte	d Avg:		
	Priority Rate	OSHA 10/30		24			
2	Retrainee	Comm'l. Skills,	397	8–210	0	\$1,386	\$26.16
	Apprentice	OSHA 10/30		Weighte	d Ava:		
	Priority Rate			72	•		
3	Retrainee	Comm'l. Skills,	20	8–210	0	\$1,521	\$26.16
	Veterans	OSHA 10/30		\ <b>\</b> /_:	al A		
	Apprentice			Weighte 72	•		
	Priority Rate			12			

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Per the union's collective-bargaining agreement (CBA)
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	Actual Wage Range	Estimated # of Trainees			
Job Number 1: Journeyworker					
Residential / Inside Wireman		27			
Job Number 2: Apprentice					
Residential / Inside Wireman		397			
Job Number 3: Veteran Apprentice					
Residential / Inside Wireman		20			

# INTRODUCTION

Santa Clara County Electrical Joint Apprenticeship and Training Trust (Santa Clara JATT or the Trust) has served the electrical industry in Santa Clara since 1958. The Trust provides training for Inside Wireman and Residential Electricians. It is a partnership between the Santa Clara Chapter of NECA and the International Brotherhood of Electrical Workers Local 332 and its 473 signatory employers (60% small businesses). The Trust offers services to 2,220 journey-level workers and 540 apprentices while it provides the Silicon Valley with union electricians with the skills, knowledge, and experience necessary to build and service commercial and residential buildings. ETP training will be conducted at the Santa Clara JATT's training center in San Jose. This is Santa Clara JATT's ninth ETP Contract, and the seventh in the last five years.

#### Veterans Program

In this proposal, Santa Clara JATT will train approximately 20 Veterans (Job Number 3). The JATT is committed to supporting job-related training that helps veterans transition into the California workforce. Veterans are actively recruited into the program. Veterans who qualify are given credit for their service-based electrical experience, bypass the entrance exam and given direct-interview access.

The Panel has established other incentives for training California veterans. Higher support costs are available to reach participants for this program.

#### Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project, the program is three to five years. The curriculum is developed with input from DAS and a designated Local Educational Agency, which, in this case, is Foothill College.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified-retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified-retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour.

# PROJECT DETAILS

The industry is constantly evolving. Changes in the California Energy Codes (Title 24) will require buildings to be more efficient by integrating lighting systems, HVAC systems and the building as a whole to operate symbiotically. Trainees will need to learn to install, maintain, and integrate a wide variety of electrical systems. Therefore, upgraded training leading to certifications is considered mandatory-vocational training. Journeyworkers require training in new green training topics and employer-driven certification classes such as passing Green Audits, Arc Flash, and Building Automation Systems.

#### **Employer Demand**

ETP funding will expand and upgrade Santa Clara JATT's program. With journey-level workers retiring at high rates in the Silicon Valley, the electrician occupation is expected to grow by 32% (2014–2024) based on recent labor market information published by the Employment Development Department (EDD). Thus, the apprenticeship training proposed prepares new Apprentices to meet the growing demand.

Santa Clara JATT reports that the following projects are driving employer demand: Vantage McLaren Data Center, Pathline Commercial/Residential project, San Jose Downtown High Rise, the ongoing expansion of the Apple headquarters, expansion of the Google campus, the BART extension into San Jose, the Lucille Packard Children's Hospital expansion, the new Stanford Hospital, the Santa Clara Valley Medical Center, China Mobile Data Center, AMD Residential

Project and the Santa Clara square project. Additional projects include upgrades, renovations, and continuing maintenance at facilities like NASA, Lockheed Martin, Facebook, Adobe, and Intel.

#### Training Plan

ETP training will be provided using Class/Lab and E-Learning delivery methods in the following:

**Business Skills**: Training will be provided to Journeyworkers on collaborative bidding and project development practices, meeting budgets, interacting with other types of construction workers, and implementing energy efficient solutions in traditional work environments. Training will also include team-building and leadership skills, so electricians can lead teams in an effective and efficient manner.

**Commercial Skills:** Training will be provided to both Journeyworkers and Apprentices. Journeyworkers will receive training in requirements, National Electrical Codes, higher safety standards, and energy efficiency practices. ARC-Flash 70E training will be offered so that the trainees will learn to avoid electrical explosions. Training for Apprentices will include installation, maintenance, and repair of various types of electrical and electronic equipment in commercial, industrial, and residential establishments. They will also learn to install, connect, and test electrical wiring systems for lighting, heating, air conditioning, and communications in any building or structure.

**Computer Skills**: This training will be provided to Journeyworkers and will include AutoCAD, which will provide trainees the tools to not only read blueprints but to be able to modify them as needed while at the jobsite. The Job Tracking training course will enable trainees to manage projects more closely by being able to look up project requirements, budgets, and timelines. Training will also include operation of scheduling and job-planning software platforms.

#### **Certified Safety Training**

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

#### Commitment to Training

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

Training Infrastructure

Santa Clara JATT's Training Director (dedicated administrator) and eight fulltime staff- Apprentice Coordinator, Instructor, Office Manager, and four Administrative Assistants will manage this project (assisting with the marketing, recruitment, needs assessments, and scheduling of training). Additionally, there are 25 part-time trainers who will deliver the training. These trainers are former or current members of the trade and experts in the subject matter. A third-party subcontractor- Strategy Workplace Communications will provide ETP-administration services.

#### Trainer Qualifications

Trainers are experienced journey-level workers who have experience and formal instruction in training methods and subject matter. Vendors with unique technical knowledge and qualifications may provide training if needed.

#### Impact/Outcome

Santa Clara JATT will offer certification classes to both Apprentices and Journeyworkers in topics such as Green Audits, Arc Flash Safety Awareness, Building Automation Systems, and CALCTP (California Advanced Lighting Control Program), CALCTP Acceptance Testing, Title 24 Lighting Installation and Codes, OSHA 10, OSHA 30, AutoDR, Energy Storage, Electric Vehicle Infrastructure Training Program and Cable Splicing. The number of awarded certifications is estimated to be 113 in this project.

These certifications increase the qualification and technical skills of the recipients and help the companies they work for reduce injuries, improve safety, and better compete in competitive bidding processes. Certifying entities include National JATC, State of California's Department of Apprenticeship Standards, Foothill College, and the Department of Labor.

#### Marketing and Support Costs

Through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and the website, class information will be disseminated throughout the year to all apprentice and journey-level electricians within the jurisdiction as well as to the electrical contractors who employ them. Application announcements for the apprentice program are disseminated to local, state, and federal agencies as well as to local high schools and community colleges; community-based organizations are also included in this effort. Santa Clara JATT is requesting 8% in support costs for Job Numbers 1 & 2 and 20% for Job Number 3 (Veterans).

#### Tuition Reimbursement

Trainees enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. This representation will be a condition of the Contract.

#### Recordkeeping

Due to the COVID-19 pandemic, an Alternative Recordkeeping (ARK) method is being requested.

#### ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0943	\$378,845	10/5/20 – 10/4/22	236	TBD	TBD

Based on ETP systems, 0 reimbursable hours have been tracked for potential earnings of \$0 (0% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress.

### PRIOR PROJECTS

The following table summarizes Contractor's performances under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
*ET20-0930	San Jose	10/7/19 — 10/6/21	\$746,701	TBD
ET19-0929	San Jose	11/5/18 – 11/4/20	\$949,589	\$949,589 (100%)
ET18-0912	San Jose	10/2/17 – 10/1/19	\$501,200	\$501,200 (100%)
ET17-0906	San Jose	10/3/16 – 10/2/18	\$501,200	\$501,200 (100%)
ET16-0905	San Jose	9/8/15 – 9/7/17	\$557,600	\$525,267 (94%)

\*ET20-0930 has tracked 0 hours for training with projected earnings over 100% of the approved amount. As such, it is expected that Santa Clara JATT will earn 100% of the contract's amount of \$746,701 when final invoices are approved.

### DEVELOPMENT SERVICES

Santa Clara JATT retained California Labor Federation and Strategy Workplace Communications in Alameda assisted with development at no cost.

### ADMINISTRATIVE SERVICES

Santa Clara JATT also retained Strategy Workplace Communications will also assist with administrative services for a fee not to exceed 13% of payment earned.

### TRAINING VENDORS

To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200 (Job Number 1)

#### Journeyworker

Trainees may receive any of the following:

### **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

- Advanced Instrumentation and Motor Controls
- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Blueprints and Schematics
- Building Automation Systems
- Cable Splicing
- Conduit Bending
- Confined Space Entry
- Electric Vehicle Infrastructure Training Program (EVITP)
- Fall Prevention
- Firestop Installation
- HVAC Controls
- Management and Monitoring of Materials
- Photovoltaic
- Programmable Logic Controllers
- Proper Equipment Set-Up (Green Training)
- Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)

- Rigging and Lifting
- Safe Working Practices
- Solar Panel Installation
- Solar Photovoltaics
- Specialized Tools
- Testing Materials and Equipment –Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- WorkFlow and Resources

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

### **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
- Computer Systems/Hardware Basics
- Internet, Networks, and Webservices
- Microsoft Office Tools: Excel, Word, & PowerPoint (Intermediate or Advanced only)
- BlueBeam

#### OSHA 10/30 (OSHA-certified instructor)

- OSHA 10
- OSHA 30

### Class/Lab/E-Learning Hours

8–210 (Job Numbers 2 & 3)

### Apprentice

Trainees may receive any of the following:

#### COMMERCIAL SKILLS

#### <u>2nd Year</u>

- Orientation, Level II
- Test Instruments, Level I
- Codeology, Level I
- AC Theory, Level I
- Blueprints, Level I
- Electrical Safety-Related Work Practices, Level I
- Transformers, Level I
- Application #5: Conduit Bending
- Application #6: Conduit Bending
- Application #7: Comb. Circuit Wiring
- Application #8: Transformer Connections

### 3rd Year

- AC Theory
- Blueprints
- Code and Practices
- Electrical Safety-Related Work Practices
- Fire Alarm Systems
- Grounding and Bonding
- Transformers
- Conduit Bending: Rigid & EMT, Chicago & 555
- Lighting Control Panels
- Motor Controls: Relays & Start/Stop
- Cad-Welding
- Ground Testing
- Transformer Wiring
- CPR/First Aid Refresher
- COMET

#### <u>4th year</u>

- Code Calculations
- Blueprints (& Layout Yard)
- Grounding and Bonding
- Motors
- Motor Control
- Lightning Protection
- Lighting Essentials
- Motor Controls: Mag Starter & 3-Wire Control
- PLC's
- VFD's
- Motor Control Labs
- Code Prep

### 5th Year

- Code and Practices
- Code Calculations
- Motor Control
- Orientation
- Rigging
- Torque
- PV/Solar Installer
- CALCTP
- EVITP
- CPR/First Aid Refresher
- Foreman Training: Managing the Work Including NECA/IBEW Presentations

### OSHA (2nd – 5th Year)

- OSHA 10
- OSHA 30

### All Years

- Cable Splicing
- Confined Space
- Fall Prevention
- HVAC Controls

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 (Journeyworker) training is capped at 200 total-training hours per trainee. Reimbursement for Job Numbers 2 & 3 (Apprentice) is capped at 200 total-training hours per trainee in Commercial Skills and 10 hours of OSHA10/30 for a total of 210 hours.



**EXPANSION FUNDS** 

# **RETRAINEE - JOB CREATION**

# **Training Proposal for:**

# Schetter Electric, LLC

## Contract Number: ET22-0128

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: C. Kaiser

### PROJECT PROFILE

Contract Attributes:	Expansion Fund Priority Rate Retrainee Job Creation Ini	, , , , , , , , , , , , , , , , , , ,	Industry Sector(s):	Construction (C)		
				Priority Industry: ⊠Yes □No		
Counties Served:	Contra Costa, Sacramento		Repeat Contractor:	🗌 Yes 🛛 No		
Union(s):				of Eelectrical Workers Local 180 and orkers Local 340		
Number of Employees in: CA:		CA: 210	U.S.:210	Worldwide: 210		
Turnover Rate: 5%		5%				
Managers/Supervisors: (% of total trainees)		N/A				

### **FUNDING DETAIL**

In-Kind Contribution

\$370,592

Total ETP Funding
\$186,760

### TRAINING PLAN TABLE

Job	Job Description		Estimated No. of	Range of Hours		Average Cost per Trainee	Post- Retention Wage*
No.	o. Job Description Type of Training		Trainees	Class / Lab	CBT		
1	Retrainee	Business Skills,	159	8-200	0-41	\$920	\$23.75
	Priority Rate	Commericial Skills, Computer Skills, Continuous Impr, OSHA 10/30, PL-Comm Skills		Weighte 40	-		
2	Retrainee	Business Skills,	22	8-200	0-41	\$1,840	\$16.00
	Priority Rate Job Creation	Commericial Skills, Computer Skills, Continuous Impr, OSHA 10/30, PL-Comm Skills		Weighte 80	-		

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$20.79 per hour for Contra Costa and \$19.19 per hour for Sacramento Counties; Job Number 2: \$15.65 per hour for Sacramento County and \$17.33 per hour for Contra Costa County.

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

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

Up to \$1.33 per hour may be used to meet the Post-Retention Wage for Job Number 2.

Wage Range by Occupation					
Occupation Titles	Actual Wage Range	Estimated # of Trainees			
Job Number 1:					
Accounting Staff		1			
		5			
Administrative Staff		10			
Engineers		8			
Estimators		2			
		7			
Field Crew		22			
		78			
Project Oversight Staff		26			
Job Number 2:					
Administrative Staff		1			
Estimators		1			
		10			
Field Crew		4			
		4			
Project Oversight Staff		2			

### INTRODUCTION

Founded in 1958 and headquartered in Sacramento, Schetter Electric, LLC (Schetter), (<u>www.schetter.com</u>) provides electrical contracting services to general contractors, building owners, and property management developers throughout Northern and Central California. Schetter will be the lead employer in this project with its affiliate, Schetter Electric, Inc. The Company's two locations in Martinez and Sacramento will receive training under this proposal. This is will be Schetter's first ETP Contract.

#### Veterans Program

Schetter employs Veterans and supports the hiring of additional Veterans.

#### Union Support

Field Crew are represented by International Brotherhood of Eelectrical Workers Local 180 and International Brotherhood of Eelectrical Workers Local 340. Both unions have submitted letters of support for this training project.

### PROJECT DETAILS

To remain competitive and keep an edge on the competition, Schetter is expanding into new building methodologies including modular construction and programmable lighting technology. Building methodologies are changing and staff must keep apprised on new building construction when installing electrical wiring. Schetter will provide training to Field Crew, Project Oversite Staff, Estimators, and Engineers on building methodologies such as concrete/rebar reinforced buildings and modular commercial buildings. Installing electrical wiring in these new types of buildings requires unique techniques in order to meet local, State, and Federal requirements. Trainees will learn how to work in various environments, proper installation methods, and mandated requirements that are different from regular building structures. Field Crew will also receive training on new programmable lighting systems, which allow the consumer to control building lights from a remote control device, digital dimmer switches, computer software programs, or IP addresses. This is a newer technology in the industry requiring Schetter to provide training on all system areas including installation requirements, testing, computer programming, and troubleshooting issues.

In addition, the Company is implementing new software programs to assist with project planning. All occupations will receive training on new software such as Building Information Modeling, In Design, and LaborChart. Additional training for all occupations include Operational Skills, Strategic Planning, Change Orders, and Project Management. Training will improve internal processes and provide employees elevated skill sets in their current occupation.

#### Training Plan

Training will be delivered via Classroom/Laboratory, E-Learning, Computer-Based Training and Productive Lab methods. In-house subject matter experts will be utilized to deliver training in the following:

**Business Skills**: Training will be offered to all occupations. Training will provide the skills to effectively and efficiently maintain business operations. Training topics include Business Writing, Product Knowledge, and Strategic Planning.

**Commercial Skills**: Training will be offered to all occupations except Accounting and Administrative Staff. Training is intended to improve upon the employee's knowledge of proper techniques for working with equipment and on the job experience. Training topics include Building Systems, Concrete Forming, Lighting, and Switches.

**Computer Skills**: Training will be offered to all occupations. Training is intended to improve software skills. Training topics include Procor and Bluebeam.

**Continuous Improvement**: Training will be offered to all occupations. Training will focus on eliminating waste and improving Company processes. Training topics include Kaizen and Process Improvement.

### Certified Safety Training

1. <u>OSHA 10/30.</u> 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.

### Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0-41 hours of CBT.

### Productive Laboratory (PL)

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

Schetter will train Field Crew on building methodologies, electrical and construction blue prints, equipment operations, sanitation, and maintenance. Training is conducted in the Classroom first to introduce trainees to machinery and concepts. Since factory equipment cannot be reproduced in a classroom setting, PL training is necessary to ensure safety and construction standards are being met. This training will be at a much slower pace than regular production and will produce significantly higher defects as trainees gain proficiency. A subject matter expert will conduct training. The trainer will first demonstrate how to use the equipment and then supervise trainees using the equipment. The trainer will attest to the trainee's competency once training is completed.

Training will be under constant supervision with a 1:3 trainer-to-trainee ratio because construction and construction processes require a team of three workers. Schetter will provide up to 100 hours of PL training due to in-depth coursework.

#### **Retrainee - Job Creation**

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

Due to the increase in demand for new construction and tenant building improvements, Schetter is expanding its business by opening another location in Martinez. The Company also expects 10% revenue increase for the next year. Thus, Schetter will hire 22 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

### Commitment to Training

The current annual training budget is approximately \$320,000 for both locations. Most of the training is for new hire orientation and safety training.

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

Training Infrastructure

Training will be provided by qualified in-house trainers. Schetter has designated the Safety Director to oversee the ETP Contract. In addition, there will be designated Administrative Staff and the Superintendent who will help with scheduling training and uploading rosters. In addition to the assigned staff members, Schetter has also retained the services of a third party subcontractor with extensive ETP experience to assist with administration.

### Temporary to Permanent Hiring

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

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

### **DEVELOPMENT SERVICES**

Sierra Consulting Services in El Dorado Hills assisted with development of this proposal for a flat fee of \$18,600.

### **ADMINISTRATIVE SERVICES**

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

### TRAINING VENDORS

To Be Determined

### Exhibit B: Menu Curriculum

### Class/Lab/E-Learning Hours

8-200 Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Business Communication
- Business Fundamentals
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Communication Styles
- Company Culture Development
- Cost Control
- Dealing with Difficult People
- Develop Employee Accountability
- Employee Coaching
- Employee Engagement
- Essential Skills for New Supervisor
- Financial Analysis
- Interpersonal Communications
- Marketing/Sales Techniques & Strategy
- Negotiating
- Operational Skills
- Organizational Structure Development
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Relationship Building
- Strategic Planning
- Time Management

### **COMMERCIAL SKILLS**

- Audio Visual
- Blue Print Reading
- Bonds
- Building Systems
- Change Order Negotiations
- Completing Work Authorization
- Concrete Forming
- Confined Space
- Construction Contract Administration
- Construction Cost Awareness and Production

- Construction Job Site Logistics/Sequencing
- Construction Management
- Construction Overview
- Construction Quality Management (CQM)
- Construction Team Support
- Construction: Job Site Preparation
- Construction: Job Site Sequencing
- Construction: Methodologies
- Contract Documents and Construction Law
- Contractual Risk Transfer
- Crisis Management
- Dimmers
- Electrical Equipment
- Electrical Installation
- Electrical Programming
- Electricity Overview
- Energy & Environmental Design for Green Building
- Engineering Theory/Planning/Design
- Environment Impact Planning
- Equipment Operation
- Equipment Safety
- Estimating
- Fall Prevention
- Foreman's Advantage
- Forklift/Scissor Lift
- Guardrails
- Insurance
- Light-Emitting Diode (LED) systems
- Leadership in Energy and Environmental Design (LEED) Building Codes/Design
- LEED Building Fundamentals
- Lien Law and Remedies
- Lighting
- Lock Out/Tag Out
- Managing Subcontractors
- Mechanical, Electrical and Plumbing
- Personal Protection Equipment
- Rigging and Signaling
- Scaffolds
- Silica Exposure
- Stairways and Ladders
- Switches
- Telecommunication Equipment
- Telecommunication Overview
- Tool (Hand Tools) Operation
- Traffic Control
- Trimble Locator
- Unit Cost Tracking
- Work Order Processing

### **COMPUTER SKILLS**

- Advanced Excel
- Building Information Modeling (BIM)
- BIM/Revit/Navis
- Bluebeam
- Computer Aid Design Software
- In Design Software Training
- Innovaya Software
- LaborChart
- Microsoft Office Intermediate and Advanced
- P6
- Plangrid
- Procor
- Projections
- Revit Architecture Fundamentals
- Safety Culture (Job Site Inspection and Safety)
- Suretrack
- Timberline Software
- Trimble
- Website Maintenance

### **CONTINUOUS IMPROVEMENT**

- 5S
- Cross Training
- Coaching Procedures
- Change Management
- Decision Making
- Effective Meetings for Leaders
- How to Coach and Mentor
- Kaizen
- Leadership
- Lean Manufacturing
- Process Improvement
- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Problem Solving and Decision Making
- Process Capability
- Quality Measurement Systems
- Root Cause Analysis
- Statistical Process Control
- Supervisor Skills
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Visual Controls

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

- OSHA 10
- OSHA 30

### **Productive Lab Hours**

0 - 100

### COMMERCIAL SKILLS (Ratio 1:3)

- Blue Print Reading
- Building Systems
- Construction Management
- Construction Quality Management (CQM)
- Construction: Job Site Preparation
- Construction: Job Site Sequencing
- Dimmers
- Electrical Equipment & Installation
- Electrical Programming
- Equipment Operation
- Forklift/Scissor Lift
- Tools (Hand Tools) Operation
- LED Systems
- Lighting
- Lock Out/Tag Out
- Mechanical, Electrical and Plumbing
- Personal Protection Equipment
- Rigging and Signaling
- Switches
- Telecommunication Equipment
- Traffic Control

#### CBT Hours

0-41

### COMMERCIAL SKILLS

- Back Safety Basics & Update 30 minutes
- Respirable Silica

- 1 hour
- 1.5 hours

### <u>OSHA 10</u>

•

Forklift

Caught In or Between 30 minutes • Cranes, Derricks, Hoists, Elevators & Conveyors 30 minutes Electrocution 1 hour Excavations 30 minutes • Falls 1.5 hours • Health Hazards in Construction 30 minutes • Introduction to OSHA 1 hour • Materials Handling, Storage, Use and Disposal 30 minutes • Personal Protective and Lifesaving Equipment 30 minutes • Scaffolds 30 minutes • Stairways and Ladders 30 minutes Struck-By 1 hour Tools – Hand and Power 30 minutes

### <u>OSHA 30</u>

<u> </u>		
٠	Asbestos Awareness	30 minutes
٠	Asbestos for Supervisors	2 hours
•	Caught-in or Between	1.5 hours
•	Confined Spaces	30 minutes
•	Cranes, Derricks, Hoists, Elevators and Conve	yors 30 minutes
•	Electrical Safety	2 hours
٠	Ergonomics	30 minutes
•	Excavations	30 minutes
٠	Fall Prevention	1.5 hours
٠	Fire Protection and Prevention	30 minutes
٠	Foundations for Safety Leadership	2.5 hours
٠	Hand and Power Tool Safety	1 hour
٠	Hazard Communication	30 minutes
٠	Hazardous Materials	30 minutes
٠	Health Hazards in Construction	2 hours
٠	Introduction to OSHA	1 hour
٠	Lead Awareness:	30 minutes
•	Lead Exposure	30 minutes
•	Managing Safety and Health	2 hours
•	Materials Handling, Use and Disposal	30 minutes
•	Motor Vehicles	30 minutes
•	Personal Protective Equipment	2 hours
•	Rollover Protective Structures, Signs, Signals	
	and Barricades	30 minutes
•	Safety and Health Programs	30 minutes
٠	Scaffolds	30 minutes
٠	Silica Exposure	30 minutes
•	Stairways and Ladders	1 hour
•	Steel Erection	30 minutes
•	Struck-by	1 hour
•	Welding and Cutting	30 minutes

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

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

LOCAL UNION 180



## INTERNATIONAL BROTHERHOOD OF ELECTRICAL WORKERS

SERVING NAPA AND SOLANO COUNTIES SINCE 1901

DEAN LLOYD PRESIDENT HERB WATTS Business Manager

October 13, 2021

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand Schetter Electric, LLC is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: approximately 12 number of employees of Journeymen inside wiremen and Foreman inside wiremen occupations.

# Exhibit E

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely Herb Watts Business Manager

720-B TECHNOLOGY WAY • NAPA, CALIFORNIA 94558 • TEL (707) 251-9180, FAX (707) 251-8040



October 13, 2021

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand Schetter Electric, LLC and Schetter Electric, Inc. is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: approximately 116 number of employees of Journeymen Inside Wiremen and Foremen Inside Wiremen occupations.

# Exhibit E

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely,

Robert D. Ward Business Manager



# **EXPANSION FUNDS** Training Proposal for:

# Solano-Napa Counties Electrical Industry Apprenticeship & Training Trust

# Contract Number: ET22-0913

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

### PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Priority Rate Apprenticeship Retrainee	Industry Sector(s):	Construction (C)
	Veterans		Priority Industry: 🛛 Yes 🗌 No
Counties		Repeat	
Served:	Napa, Solano	Contractor:	🛛 Yes 🗌 No
Union(s):	n(s): Yes No International Brotherhood of Electrical Workers Local 180		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

### FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$352,800		\$26,380 Job Number 1: 8% Job Number 2: 20%		\$379,180
In-Kind Contribution:	50% of	Total ETP Funding Required	l	Inherent

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Apprentice	Comm'l. Skills, OSHA 10/30	93	8–210 Weighte 200	•	\$3,850	\$27.06
2	Retrainee Veterans Apprentice	Comm'l. Skills, OSHA 10/30	5	8–210 Weighte 200	-	\$4,226	\$27.06

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Job Numbers 1 & 2: \$26.08 per hour

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

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

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

Wage Range by Occupation					
Occupation Titles	Actual Wage Range	Estimated # of Trainees			
Job Number 1					
Apprentice Electrician		93			
Job Number 2					
Veteran Apprentice Electrician		5			

### INTRODUCTION

The Solano-Napa Counties Electrical Industry Apprenticeship & Training Trust (Solano-Napa Counties Electrical) provides education and training to Apprentice and Journey-level workers in the electrical construction trade throughout the Solano and Napa counties. Apprentice Electricians plan, layout, install, repair, and maintain electrical equipment that provides light, heat, communications, and power. Based in Napa, Solano-Napa Counties Electrical is established by the International Brotherhood of Electrical Workers and the National Electrical Contractors Association. Solano-Napa Counties Electrical provides the electrical construction industry with training to meet the demands of the workforce in California. This will be Solano-Napa Counties Electrical second ETP Contract, and it's second in the last five years.

There is an estimate of 655 Apprentices and Journeyworkers in the Solano/Napa area. Although Solano-Napa Counties Electrical trains Journeyworkers, only 98 Apprentices will participate in this project.

### Veterans Program

In this proposal, Solano-Napa Counties Electrical will train five Veteran Apprentices (Job Number 2). It recruits Veterans in cooperation with Helmets to Hardhats, a national joint labormanagement program that recognizes the link between skills acquired in military service and the building trades. The Veteran Apprentices will have the same curriculum as the other Apprentices.

### Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project, the program is five years. The curriculum is developed with input from DAS and a designated Local Educational Agency in this case Napa Valley Adult School.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90-consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified-retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour. The ETP wage for Apprentices is no less than \$26.08 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

### **Employer Demand**

ETP funding will expand and upgrade the Solano-Napa Counties Electrical program. Training under this proposal will ensure that Trust keeps up with changes in electrical construction (code, safety, etc.), while offering new training focused on efficient electrical control systems and energy conservation. In addition, the shift from analog to digital equipment dictates the need for extensive training. The training in this proposal prepares new Apprentices to replace the high number of retiring Journeyworker Electricians and provides them with the necessary skills for upcoming jobs.

Solano-Napa Counties Electrical reports that the following projects are driving employer demand under this proposal: Hanger 3 (Travis Air Force Base); Solano Community College; La Clinica Vallejo Expansion; Schultz Gas Recovery Project; Northern Electric Napa Valley Junction Elementary Project; Eucalyptus Drive/Wetlands Edge Road; and, Markham Elementary Modulars.

### PROJECT DETAILS

Solano-Napa Counties Electrical's training schedule varies, but most of the training will occur during the fall, winter, and spring months with limited training occurring during the summer. Solano-Napa Counties Electrical will hold online classes and restricted labs at the training center on scheduled days.

### Training Plan

Training will be delivered via Class/Lab and E-Learning in the following:

**Commercial Skills**: Training will be offered to all Apprentices and include Lighting Design Basics, Motor Controls, Code Calculations, and Electrical Theory.

### Certified Safety Training

<u>OSHA 10/30:</u> This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 or 30 hours of classroom training for Apprentices and Veteran Apprentices. 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.

### Marketing and Support Costs

Solano-Napa Counties Electrical is requesting, and staff supports, 8% in support costs for Job Number 1 (Apprentices) and 20% in support costs for Job Number 2 (Veteran Apprentices) to fund marketing to employers to recruit, to fund its staff in recruiting and qualifying additional participating employers for this program, and to conduct ongoing assessments of employer-specific job requirements. There is one staff member at Solano-Napa Counties Electrical that will assist with the marketing, recruitment, needs assessments, and scheduling of training.

Solano-Napa Counties Electrical and the various local unions will publicize the availability of training through direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements, and e-mail announcements. It will also promote this training program at labor-management meetings, industry assemblies, site visits to local schools, trade shows, industry meetings, and vocational outreach organizations.

### 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

The Training Director (dedicated administrator) will oversee the ETP Project. The training center has eight (part-time) trainers who are former or current members of the trade and are subject-matter experts. Solano-Napa Counties Electrical has also hired a third-party subcontractor, Strategy Workplace Communications, for ETP-administration services.

#### Impact/Outcome

Solano-Napa Counties Electrical will offer 50–100 certifications (per topic) in topics such OSHA 10, OSHA 30, Building Automation Systems, Fall Protection, California Advanced Lighting Controls Training Program Lighting Certification, Title 24 Lighting Installation and Codes, Energy Storage, Electric Vehicle Infrastructure, Fork Lift, Boom Lift, and Scissor Lift. The certifications are issued by the authorized JATC's or the JATC's signatory entities in compliance with applicable-certification standards. These certifications increase the trainees' skills, improve safety (thereby reducing injury), and make the trainee and the employer more competitive.

#### **Tuition Reimbursement**

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

### Alternate Recordkeeping

All in-person training will have reduced class sizes to adhere to state-mandated social distancing guidelines. Alternative recordkeeping method has been requested due to the COVID-19 pandemic.

### ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0913	\$161,921	10/5/20 – 10/4/22	93	TBD	TBD

Based on ETP systems, 191.62 reimbursable hours have been tracked for potential earnings of \$3,688.76 (2.3% of approved amount). The Contractor projects final earnings of 100% based on training currently delivered. All training was reportedly completed under this Contract. All training hours and invoicing are being uploaded and submitted in August and September of 2021.

### **DEVELOPMENT SERVICES**

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

### ADMINISTRATIVE SERVICES

Strategy Workplace Communications 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/E-Learning Hours

8–210

Trainees may receive any of the following:

### **COMMERCIAL SKILLS**

2<sup>nd</sup>-Year Curriculum

- AC Systems
- AC Theory
- Blueprints Reading
- Code Calculations
- Code and Practices
- Codeology- National Electric Code (2014 Code Book Review)
- Electrical Safety Related Work Practices
- Electrical Theory
- Estimating
- Pipe Bending Conduit Fabrication
- Test Instruments
- Transformers

#### 3rd-Year Curriculum

- AC Theory
- Blueprint Reading
- Code and Practices
- Codeology- National Electric Code (2014 Code Book Review)
- Electrical Safety
- Electrical Theory
- Fire Alarm Systems
- Grounding and Bonding
- Lighting Design Basics
- NFPA 70E
- OSHA
- Pipe Bending Conduit Fabrication
- Preparing For Leadership
- Rigging, Hoisting, and Signaling
- Transformers
- Test Instruments

#### 4<sup>th</sup>-Year Curriculum

- Automated Demand Response
- Building Automation
- Code and Practices
- Code Calculations
- Codeology- National Electric Code (2014 Code Book Review)
- Electrical Systems
- Electrical Theory
- Grounding and Bonding
- Health Care Systems

- Lightning Protection
- Motor Controls
- Motors
- Pipe Bending Conduit Fabrication
- Programmable Logics
- Test Instruments

### 5<sup>th</sup>-Year Curriculum

- Automated Demand Response
- Blue Print Reading
- Building Automation
- Code Calculations
- Codeology- National Electric Code (2014 Code Book Review)
- Code and Practices
- Electrical Theory
- Estimating
- Intrusion Detection
- Instrumentation
- Motor Control
- Pipe Bending Conduit Fabrication
- Photovoltaic Systems
- Rigging, Hoisting, and Signaling
- Structured Cabling
- Torque
- Transformers

### All Years

- AC Systems
- AC Theory
- Automated Demand Response
- Blueprint Reading
- Blueprints Reading
- Building Automation
- Catastrophic Failure Response
- Code and Practices
- Code Calculations
- Codeology- National Electric Code
- Code Book Review
- Code of Excellence
- Electrical Safety
- Electrical Safety Related Work Practices
- Electrical Systems
- Electrical Theory
- Electronic Systems
- Estimating
- Electrical Vehicle Infrastructure Training Program
- Fall Protection
- Fire Alarm Systems
- Grounding and Bonding
- Health Care Systems

- High Voltage Cable Splicing
- Intrusion Detection
- Lightning Protection
- Lighting Design Basics
- Motor Control
- Motors
- MSHA
- NFPA 70E
- Network Technologies
- Pipe Bending
- Photovoltaic Systems
- Preparing For Leadership
- Programmable Logics
- Rigging, Hoisting, and Signaling
- Structured Cabling
- Test Instruments
- Torque
- Transformers
- California Advanced Lighting Controls Training Program Lighting Certification
- Title 24 Lighting Installation and Codes
- Energy Storage
- Folk Lift
- Boom Lift
- Scissor Lift

OSHA 10/30 (OSHA-Certified linstructor)

- OSHA 10
- OSHA 30

Safety training cannot exceed 10% of total training hours for any individual trainee. The 10% safety training cap does not apply to OSHA 10/30 training.

Note: Reimbursement for trainees in Job Numbers 1 and 2 is capped at 200 totaltraining hours per trainee in Commercial Skills and 10 hours of OSHA 10/30 for a total of 210 hours.



# **EXPANSION FUNDS**

# **Training Proposal for:**

# South Bay Workforce Investment Board, Inc.

## Contract Number: ET22-0136

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: M. Reeves

### PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Retrainee SB <100 HUA Priority Rate	Industry Sector(s):	MEC (H) Manufacturing (33) Aerospace Related Healthcare (62)	
			Priority Industry: 🖂 Yes 🔲 No	
Counties		Repeat		
Served:	Statewide	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
\$552,500		\$38,280 8%		\$590,780
In-Kind Contribution:	50% of <sup>-</sup>	Total ETP Funding Required	1	\$354,368

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Literacy Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills, MS Clinical Preceptor, MS Didactic	305	8-200 0-100 Weighted Avg: 60		\$1,476	\$19.12
2	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Literacy Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills, MS Clinical Preceptor, MS Didactic	175	8-200 Weighter 28		\$688	\$19.12
3	Retrainee HUA Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Literacy Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills	15	8-200 Weighted 20	-	\$492	**\$15.00
4	Retrainee	Business Skills, Computer Skills, Cont. Imp., HazMat, Literacy Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills	20	8-200 Weighter 30	-	\$641	\$19.12

\*Post-Retention Wage is the Contractual Wage

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

**Minimum Wage by County:** <u>Job Numbers 1, 2 & 4</u>: \$20.86 per hour for Alameda, Marin, San Mateo, Santa Clara, and San Francisco counties; \$20.79 per hour for Contra Costa County; \$19.77 per hour for Los Angeles County; and \$19.12 per hour for all other counties.

<u>Job Number 3 (HUA)</u> : \$14.83 per hour for Los Angeles County; and \$14.34 per hour for all other counties.
<b>Health Benefits:</b> 🛛 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 \$2.50 per hour to meet the Post-Retention Wage for Job Numbers 1, 2 & 4.

Wage Range by Occupation				
Occupation Titles	Actual Wage Range	Estimated # of Trainees		

Job Numbers 1, 2 & 4	
	6
Operations/Support Staff	27
	52
	22
Manufacturing/Production Staff	48
	55
	11
Logistics/Warehouse/Distribution Staff	22
	22
Engineering/Information Technology Staff	44
	46
	11
Quality Assurance Staff	12
	32
Sales/Marketing Staff	12
	18
Supervisor/Manager	20
New Graduate Registered Nurse	4
	6
Registered Nurse	10
Licensed Vocational Nurse	4
	6
Therapist/Technician/Phlebotomist	5
	5
Job Number 3 (HUA)	
Operations/Support Staff	2
Manufacturing/Production Staff	4
Logistics/Warehouse/Distribution Staff	3

Engineering/Information Technology Staff	2
Quality Assurance Staff	2
Sales/Marketing Staff	2

### INTRODUCTION

The South Bay Workforce Investment Board (SBWIB) (<u>www.sbwib.org</u>) has been providing employment and training services under the oversight of the U. S. Department of Labor and the California Employment Development Department for more than 39 years. SBWIB provides comprehensive employment and training services under the federal Workforce Innovation Opportunity Act (WIOA). SBWIB's goal is to provide a fully integrated workforce system that maximizes employment and economic opportunity in partnership with business. This will be SBWIB's fourth ETP contract, and the fourth in the last five years.

SBWIB serves more than 15,000 job seekers annually in the WIOA population of dislocated workers and youth. SBWIB also works collaboratively with economic development partners to serve the needs of employers to both attract and retain business in California. Employer services include small business development, recruitment/hiring support, and customized training. Job seeker services include labor market information, skills/interest assessments, and occupational skills training.

### Veterans Program

Although SBWIB is not including a separate Veterans' Job Number, its participating employers regularly employ Veterans through their normal hiring practices. SBWIB also maintains an office at the Los Angeles Air Force Base to assist transitioning veterans.

### High Unemployment Area

The trainees in Job Number 3 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. SBWIB will potentially serve participating employers in HUA locations in Imperial, Kern, Los Angeles, Riverside, San Bernardino, and Ventura counties.

For HUA trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post retention wages exceed the start-of-training wages. SBWIB is requesting a wage modification to the HUA Minimum Wage (ranging from \$14.34 to \$15.65 per hour statewide) for the trainees in Job Number 3. As indicated above, trainees will never be paid less than the State or local minimum wage rate in effect at the end of retention, regardless of the wages expressed here.

### PROJECT DETAILS

Training will occur primarily in Los Angeles County. However, some of the participating employers may have additional locations in other parts of California; therefore, this project may serve companies statewide.

SBWIB's Manufacturing Sector Partnership supports efforts to create a workforce pipeline of skilled employees to meet labor demand. The collaboration with employer partners in priority industry sectors helps identify ways to address employee skill gaps, understand job forecasts, and improve awareness of evolving employer needs.

In addition to addressing challenges in the Manufacturing sector, SBWIB also works with other industries, including a new focus on Information Technology and Quantum Computing. SBWIB

also serves companies in the healthcare and energy sectors. As rapid industry changes require reskilled and/or upskilled workers, SBWIB is helping employers fill skill gaps within their workforce and access talent pipeline programs.

The proposed training will allow participating employers to equip frontline workers with the knowledge and skills necessary to maximize productivity and operational efficiency. The core group of participating employers represents at least 80% of the demand for training and includes eight small businesses. Some employers may have participated in at least one of SBWIB's previous Contracts, and several topics from the proposed Curriculum are repeated from prior ETP projects. However, course content has been updated and no trainees that participated in prior projects will receive duplicative training in this proposed Contract.

### Training Plan

The following will be delivered via Class/Lab, E-Learning, Productive Lab (PL) and Computer-Based Training (CBT):

**Business Skills**: Training will be provided to all occupations. Training will focus on customer service, business fundamentals, cost control, communication, sales/marketing, and supply chain management.

**Computer Skills**: Training will be provided to all occupations. Training will help workers become more proficient with software solutions in the areas of 3D technology, computer-aided design, Cybersecurity, digital media, and database management.

**Continuous Improvement**: Training will be provided to all occupations. This training will focus on process improvement and problem solving methodologies that enhance productivity through lean manufacturing principles, project management, strategic planning, teamwork, and statistical process control concepts.

**Hazardous Materials**: Training will be provided to Logistics/Warehouse/Distribution Staff, Manufacturing/Production Staff, and Supervisors/Managers. This training will provide clean room and hazardous materials skills to frontline workers and lead personnel. Trainees will learn proper handling of hazardous materials, chemicals, and waste associated with manufacturing processes.

**Literacy Skills**: Training will be provided to Manufacturing/Production Staff and Logistics/Warehouse/Distribution Staff. Vocational English as a Second Language training will help workers improve their job-related reading, writing and comprehension. This training will improve trainees' communication skills and help them perform their jobs with greater confidence and proficiency.

**Manufacturing Skills**: Training will be provided to Manufacturing/Production Staff, Engineers, Logistics/Warehouse/Distribution Staff, and Quality Assurance Staff. Training will cover various aspects of assembly, machining, engineering, metalworking, equipment operation, maintenance and testing.

### Certified Safety Training

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

Training will be provided to Production/Manufacturing Staff, Operations/Support Staff, Supervisors/Managers, and Logistics/Warehouse/Distribution Staff.

**Medical Skills Training**: Approximately 20 RNs and 10 LVNs will participate in Medical Skills Didactic and Clinical Preceptor training. Therapists, Technicians, and Phlebotomists may also receive training on select Medical Skills topics based on their respective job duties. This training will address deficiencies in specific skills to ensure that employees are competent in advanced medical procedures. Training will focus on the latest techniques and methodologies for providing safe and effective patient care. Training topics will include patient assessment and care, upgraded safety protocols, wound care management, code-specific responses/procedures, and documentation skills.

### **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.

For many of the participating employers, PL training allows for practical, hands-on instruction in a productive environment that cannot be adequately duplicated in a classroom setting. Therefore, approximately 60 hours of PL-Manufacturing Skills training will be provided to roughly 50 trainees among the Manufacturing/Production, Logistics/Warehouse/Distribution, and Quality Assurance occupations. This training will help workers achieve the technical competencies needed to perform their jobs with the highest level of safety and efficiency.

PL training will focus on production skills, equipment operation, and maintenance. PL training will include the use of manufacturing machinery, hydraulics, automated assembly equipment, diagnostic analysis/testing tools, fluid fill equipment, and material handling equipment. Training will be taught by qualified instructors with industry knowledge and expertise in manufacturing processes. The trainer-to-trainee ratio will not exceed 1:1.

### Marketing and Support Costs

SBWIB's marketing and recruitment efforts include networking with training and development professionals, newsletters, online marketing campaigns, trade shows, and direct telephone contact. SBWIB maintains relationships with employers, industry groups, consortiums, and employment councils throughout the region.

SBWIB is requesting and staff recommends 8% support costs for program marketing and trainingrelated activities, including the recruitment of participating employers and assessment of employer-specific job requirements for retrainees.

### **Tuition Reimbursement**

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

### Commitment to Training

ETP funds will not displace the existing financial commitment to training of participating employers. Most companies provide job orientation, government mandated courses and basic skills training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

### Training Infrastructure

SBWIB's Regional Affairs Manager will oversee project administration, and four Special Projects staff members will assist with recruitment, scheduling, tracking, and documentation. SBWIB has also retained an outside administrative consultant to assist with ETP administration requirements. SBWIB anticipates that approximately 95% of the proposed training will take place at employer worksites, with the remainder being center-based. Training will be delivered by in-house (employer and center-based) subject matter experts and vendors as needed.

### ACTIVE PROJECTS

The following table summarizes performance by SBWIB under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET20-0204	\$396,519	12/23/19 — 12/22/21	389	510	117

Based on ETP Systems, 16,127 reimbursable hours have been tracked for potential earnings of \$395,757 (99.8% of approved amount). The Contractor projects final earnings of 100% based on training delivered to date, pending contract closeout.

### PRIOR PROJECTS

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

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0166	Statewide	08/01/18 – 07/31/20	\$263,053	\$263,053 (100%)
*ET16-0126	Statewide	08/03/15 – 08/02/17	\$199,050	\$72,089 (36%)

\*Poor performance was due to SBWIB's termination of a training vendor during the contract term and the challenge to find a suitable replacement. Training was highly specialized, making it more difficult to procure a comparable replacement training vendor.

SBWIB's performance rebounded significantly on its subsequent contract (ET19-0166) due to successful collaboration with a larger pool of resources for training delivery. SBWIB also restructured its training plan primarily around the Aerospace & Defense supply chain (Priority Industry), which has enhanced SBWIB's ability to achieve its training objectives.

### **DEVELOPMENT SERVICES**

Training Funding Partners (TFP) in Huntington Beach assisted with development for a flat fee of \$5,500.

### ADMINISTRATIVE SERVICES

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

### TRAINING VENDORS

To Be Determined

### Exhibit B: Menu Curriculum

#### Class/Lab Hours/E-Learning

8-200

Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Aerospace Overview
- Bioscience/Bioengineering Overview
- Business Analysis/Assessment
- Business Fundamentals
- Business Writing
- Conflict Resolution/Management
- Cost Control
- Customer Service Skills
- Effective Communication Skills
- Effective Meeting Skills
- Estimating/Quoting/Contracting Skills
- Finance/Accounting Skills
- Good Documentation Practices
- Import/Export Skills
- Inventory Control/Inventory Management
- Marketing/Sales Skills
- Negotiation Skills
- Presentation Skills
- Supply Chain/Logistics
- Time Management Skills

### COMPUTER SKILLS

- 3D Inspection for CNC parts
- 3D Advanced Inspection with Analysis
- 3D Reverse Engineering
- 3D Tooling & Fabrication
- Adobe Acrobat
- Artificial Intelligence
- Blockchain
- Cloud Computing
- Computer Aided Design (CAD)
- Computer Aided Engineering (CAE)
- Computer Aided Manufacturing (CAM)
- Computer Skills for Production and Inventory
- Computerized Maintenance Management System
- Cybersecurity
- Database Management Skills
- Digital Media
- Enterprise/Resource/Manufacturing Planning Systems
- Intermediate/Advanced Microsoft Word, Excel, PowerPoint Skills
- Machine Learning
- Microsoft Project
- Payroll/Accounting Systems

- Quantum Computing
- Software Engineering/Development
- SharePoint
- Shop Floor Computer Skills

### **CONTINUOUS IMPROVEMENT**

- 5S/Lean Manufacturing/Six Sigma
- Business Performance/Goal Setting
- Business Process Improvement/Innovation/Reengineering
- Coaching/Feedback Skills
- Decision Making
- Demand Flow Technology (DFT)
- DISC Assessment Learning
- Effective Leadership Skills / Situational Leadership
- Interpreting & Analyzing Data
- Managing Change
- Organizational Performance Process Review
- Problem Solving
- Process Mapping/Deployment
- Product Design/Development Skills
- Project/Program/Performance Management
- Risk Management
- Root Cause Analysis
- Simulation Modeling Skills
- Statistical Process Control Concepts, Theory, Application
- Strategic Planning
- Team Work/Building Teams
- Total Productive Maintenance (TPM)
- Total Quality Management Skills
- Toyota Lean-Kata
- Value Stream Mapping

### HAZARDOUS MATERIALS

- Clean Room / Clean Lab Training
- Hazardous Chemicals and Cleaning
- Hazardous Materials
- Hazardous Waste and Cleaning

### LITERACY SKILLS

- Vocational English as a Second Language (VESL)
  - o Basic English Language Skills
  - o Writing/Reading/Language Comprehension

Literacy Skills training cannot exceed 45% of total training hours pertrainee

### **MANUFACTURING SKILLS**

- 3-D Printing Technology/Inspection
- Additive/Deductive Manufacturing
- Advanced CNC Equipment Training and Programming
- Assembly/Production Processes/Procedures

- Blueprint Reading
- Cycle Time Management
- Electrical and Motor Drives/Electrical Power/Power Transmission
- Engineering Design/Design of Experiments
- Equipment Operations
- Failure Mode and Effects Analysis (FMEA)
- Fiber Optics
- Geometric Dimensioning and Tolerancing
- Good Manufacturing Practices
- HAAS Equipment Automation
- Industrial Combustion
- Industrial Hydraulics
- Inventory Management
- ISO Skills
- Laser Cutting
- Logistics and Shipping
- Machining Skills
- Maintenance/Preventative Maintenance Procedures
- Manufacturing and Assembly Practices
- Materials Processing/Material Resource Planning
- Mechanical and Fluid Systems
- Metal Stamping Press/Metalworking
- NIMS (National Institute for Metalworking Skills) Certification(s)
- Non-Destructive Testing
- Pneumatics
- Programmable Logic Control (PLC)/Computer Numerical Control (CNC)
- Prototyping
- Quality/Testing
- Shop Math
- Small Batch Manufacturing
- Smart Manufacturing
- Standard Work Skills
- Variable Frequency Drives
- Warehouse Operations/Distribution

## OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

#### Productive Lab (PL) Hours

0-60

#### **PL - MANUFACTURING SKILLS** (1:1 trainer-to-trainee ratio)

- 3-D Printing Technology/Inspection
- Additive/Deductive Manufacturing
- Advanced CNC Equipment Training and Programming
- Assembly/Production Processes/Procedures
- Blueprint Reading
- Cycle Time Management

- Electrical and Motor Drives/Electrical Power/Power Transmission
- Engineering Design/Design of Experiments
- Equipment Operations
- Failure Mode and Effects Analysis (FMEA)
- Geometric Dimensioning and Tolerancing
- Good Manufacturing Practices
- HAAS Equipment Automation
- Industrial Combustion
- Industrial Hydraulics
- Inventory Management
- ISO Skills
- Laser Cutting
- Logistics and Shipping
- Machining Skills
- Maintenance/Preventative Maintenance Procedures
- Manufacturing and Assembly Practices
- Materials Processing/Material Resource Planning
- Mechanical and Fluid Systems
- Metal Stamping Press/Metalworking
- Pneumatics
- Programmable Logic Control (PLC)/Computer Numerical Control (CNC)
- Prototyping
- Quality/Testing
- Shop Math
- Small Batch Manufacturing
- Smart Manufacturing
- Standard Work Skills
- Variable Frequency Drives
- Warehouse Operations/Distribution

#### **CBT Hours**

0-100

#### **CBT - MANUFACTURING SKILLS**

- 5S Overview 151 (1 hour)
- Basic Measurement 101 (1 hour)
- Basic Tolerance 121 (1 hour)
- Bloodborne Pathogens 161 (1 hour)
- Blueprint for Success I (4 hours)
- Blueprint for Success II (5 hours)
- Blueprint Reading 131 (1 hour)
- Cell Design and Pull Systems 161 (1.5 hours)
- Concepts of Calculus 31 (1.5 hours)
- Electrical Print Reading 261 (1.5 hours)
- Electrical Units 101 (1.5 hours)
- Ergonomics 102 (1.5 hours)
- Fire Safety and Prevention 181 (1 hour)
- Geometry: Circles and Polygons 171 (1.5 hours)
- Geometry: Lines and Angles 151 (1.5 hours)

- Geometry: Triangles 161 (1.5 hours)
- Hand and Power Tool Safety 201 (1 hour)
- Intro to Fluid Systems 100 (1.5 hours)
- Intro to PLCs 200 (1.5 hours)
- Introduction to Additive Manufacturing 111 (1 hour)
- Introduction to Assembly 101 (1 hour)
- Introduction to CAD and CAM for Machining 241 (1.5 hours)
- Introduction to Circuits 201 (1.5 hours)
- Introduction to CNC Machines 201 (1 hour)
- Introduction to Magnetism 211 (1.5 hours)
- Introduction to Mechanical Properties 111 (1.5 hours)
- Introduction to Physical Properties 101 (1.5 hours)
- Introduction to Robotics 201 (1 hour)
- Lean Manufacturing Overview 101 (1 hour)
- Lock-out/Tag Out 141 (1 hour)
- Logic and Line Diagrams 312 (1.5 hours)
- Manufacturing Process Applications: Part I 124 (1.5 hours)
- Manufacturing Process Applications: Part II 125 (1.5 hours)
- Math Fundamentals 101 (1 hour)
- Math: Fractions and Decimals 111 (1 hour)
- Metrics for Lean 231 (1.5 hours)
- Personal Protective Equipment 111 (1 hour)
- Quality Overview 111 (1 hour)
- Relays, Contactors, and Motor Starters 201 (1.5 hours)
- Robot Safety 211 (1 hour)
- Safety for Assembly 211 (1 hour)
- SDS and Hazard Communication 151 (1 hour)
- SPC Overview 211 (1.5 hours)
- Symbols and Diagrams for Motors 311 (1.5 hours)
- The Forces of Fluid Power 110 (1.5 hours)
- Tools for Threaded Fasteners 235 (1 hour)
- Total Quality Management Overview 261 (1.5 hours)
- Trigonometry: Sine Bar Applications 221 (1.5 hours)
- Trigonometry: Sine, Cosine, Tangent 211 (1.5 hours)
- Trigonometry: The Pythagorean Theorem 201 (1.5 hours)
- Troubleshooting 181 (1 hour)
- Units of Measurement 112 (1 hour)

Safety Training cannot exceed 10% of total training hours per-trainee, excluding HazMat and OSHA 10/30.

<u>Class/Lab/E-Learning Hours</u> (Healthcare Occupations Only) 8-200

#### MEDICAL SKILLS TRAINING - CLINICAL PRECEPTOR

- Emergency Department Training
  - Emergency Room Nursing Skills
  - o Emergency Care of the Burn Patient
  - o OB Trauma
  - o Trauma Nursing Skills

- Triage Nursing Skills
- Care of Pediatric patients
- Intensive Care Unit/Critical Care Unit Training
  - o Critical Care Nursing Skills
  - Patient Assessment & Care
  - o Intra-Aortic Balloon Pump (IABP)Therapy
  - o Intracranial Pressure Monitoring & Ventriculostomy
  - Hemodynamic Monitoring
  - Pre and Post-Operative Care
  - o Care of Trauma Patient
  - Management of the Renal Transplant Surgical Patient
  - Ventilator & Tracheotomy Care
- Medical/Surgical Unit Training
  - o Patient Assessment & Care
  - o Medical/Surgical Nursing Skills
  - o Pre and Post-Operative Care
  - o Orthopedic Nursing Skills
  - o Management of the Renal Transplant Surgical Patient
  - Oncology Nursing Skills
- Neonatal Intensive Care Unit (NICU) Training
  - o Patient Assessment & Care
  - Neonatal Resuscitation Provider (NRP)
  - Neonatal Advanced Life Support
  - o Neonatal Intensive Care Unit (NICU) Nursing Skills
  - Neonatal/Infant Pain Scale (NIPS)
  - o Palliative Care
- Obstetrics Unit Training
  - Patient Assessment & Care
  - Antepartum, Labor, Delivery and Postpartum Skills
  - o Neonatal Nursing Skills
  - o S.T.A.B.L.E.
  - Advanced & Electronic Fetal Monitoring
  - Neonatal Resuscitation Provider (NRP)
  - Neonatal Intensive Care Unit (NICU) Nursing Skills
- Operating Room and Post-Anesthesia Care Unit (PACU) Training
  - Patient Assessment & Care
  - Trauma Nursing Skills
  - o Care of the Burn Patient
  - Peri-operative Nursing Skills
  - Pre and Post-Operative Care
- Pediatric Services Unit
  - Care of Pediatric Patients (Acute Care, Intensive Care)
  - o Patient Assessment & Care
  - Pre & Post-Operative Care
- Special Care Unit Training
  - Patient Assessment and Care
  - Critical Care Nursing Skills
  - Ventilator & Tracheotomy Care
  - Hemodynamic Monitoring
  - o Total Parenteral Nutrition
- Surgical Services Unit Training
  - Patient Assessment & Care

- Trauma Nursing Skills
- o Surgical Nursing Skills
- Pre and Post-Operative Care
- Telemetry Unit Training
  - Care of the Cardiac Patient
  - EKG & Cardiac Monitoring
  - Dysrhythmia Interpretation
  - o Telemetry Nursing Skills
  - Pre and Post-Operative Care
  - o Care of the Neurosurgical Patient
  - o Intravenous (IV) Therapy
  - o Oncology Nursing Skills

#### **MEDICAL SKILLS TRAINING – DIDACTIC**

- Acute Psychiatric Care
- Acute Myocardial Infarction
- Advanced Cardiac Life Support (ACLS)
- Arterial Blood Gas (ABG) Interpretation
- Basic Life Support (BLS)
- Body Mechanics
- Care of the Cardiac Patient
- Care of the Neurosurgical Patient
- Care of Pediatric Patients (Acute Care, Intensive Care)
- 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
- Electronic Fetal Monitoring (Beginning & Advanced)
- Emergency Care of the Burn Patient
- Emergency Room Nursing Skills
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulseoximeter, ventilators, specialty beds and mattresses, etc.)
- Evidence Based Practices
- Gastrointestinal Assessment and Management
- Hemodynamic Monitoring
- Infection Control
- Intra-Aortic Balloon Pump Therapy (IABP)
- Intra-Cranial Pressure Monitoring & Ventriculostomy
- Intravenous (IV) Insertion & Therapy
- Kinetic Therapy
- Labor, Delivery and Postpartum Nursing Skills
- Management of the Renal Transplant Surgical Patient
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation

- Neonatal Advanced Life Support (NALS)
- Neonatal/Infant Pain Scale (NIPS)
- Neonatal Intensive Care Unit (NICU) Nursing Skills
- Neonatal Nursing Skills
- Neonatal Resuscitation Provider (NRP)
- New Graduate Nursing Skills
- Nurse Orientation Training (for New Grads only)
- Nursing Diagnosis Skills
- Nursing Process Skills
- OB Trauma
- Oncology Nursing Skills
- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Pediatric Advanced Life Support (PALS)
- 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
- S.T.A.B.L.E.
- Telemetry Nursing Skills
- Total Parenteral Nutrition (TPN)
- Transfer Techniques
- Triage Nursing Skills
- Trauma Nursing Skills
- Ventilator and Tracheotomy Care
- Versant New Graduate Program Skills
- Wound & Skin Care

## **CONTINUOUS IMPROVEMENT**

- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills
- CORE Measures
  - Crisis Prevention Intervention (CPI)
- Critical Thinking Skills
- Culturally Appropriate Care
- Customer Service Skills
- Documentation Skills
- Organization and Time Management Skills
- Patient and Family Centered Care Skills

- Preceptor Skills (train-the-trainer)
- Performance and Quality Improvement and Procedures Skills
- Utilization Review

## **COMPUTER SKILLS**

- Patient Billing and Accounts Receivable (PBAR) tracking Skills
- Order Entry Skills
- Electronic Medical Records Application Skills

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

## Self-reported listing of potential employers participating in the contract

Contractor's Name: South Bay Workforce Investment Board, Inc.	CCG No.: ET22-0136				
Reference No: 21-0842	Page 1 of 4				
ALPHABETIZE BY COMPANY NAME					
Company: Ampaire, Inc.	Priority Industry? 🛛 Yes 🗌 No				
Address: 3507 Jack Northrop Avenue					
City, State, Zip: Hawthorne, CA 90250					
Collective Bargaining Agreement(s): N/A					
Estimated # of employees to be retrained under this Contract: 30	Small Business? 🛛 Yes 🗌 No				
Total # of full-time company employees worldwide: 34					
Total # of full-time company employees in California: 34					
Company: Bachem Americas, Inc.	Priority Industry? 🛛 Yes 🗌 No				
Address: 3132 Kashiwa St.					
City, State, Zip: Torrance, CA 90505					
Collective Bargaining Agreement(s): N/A					
Estimated # of employees to be retrained under this Contract: 150	Small Business? 🗌 Yes 🛛 No				
Total # of full-time company employees worldwide: 400					
Total # of full-time company employees in California: 400					
Company: Cognizant Technology Solutions U.S. Corporation	Priority Industry? 🛛 Yes 🗌 No				
Address: 6210 Stoneridge Mall Rd					
City, State, Zip: Pleasanton, CA 94588					
Collective Bargaining Agreement(s): N/A					
Estimated # of employees to be retrained under this Contract: 100	Small Business? 🗌 Yes 🖾 No				
Total # of full-time company employees worldwide: 298,239					
Total # of full-time company employees in California: 3,000					
Company: DeKing Screw Products, Inc.	Priority Industry? 🛛 Yes 🗌 No				
Address: 20416 Prairie Street					
City, State, Zip: Chatsworth, CA 91311					
Collective Bargaining Agreement(s): N/A					
Estimated # of employees to be retrained under this Contract: 10	Small Business? 🛛 Yes 🗌 No				
Total # of full-time company employees worldwide: 30					
Total # of full-time company employees in California: 30					

ALPHABETIZE BY COMPANY NAME

## Self-reported listing of potential employers participating in the contract

Contractor's Name: South Bay Workforce Investment Board, Inc.	CCG No.: ET22-0136
Reference No: 21-0842	Page 2 of 4
Company: Freudenberg Medical, LLC	Priority Industry? 🛛 Yes 🗌 No
Address: 5050 Rivergrade Road	
City, State, Zip: Baldwin Park, CA 91706	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 200	Small Business? 🗌 Yes 🛛 No
Total # of full-time company employees worldwide: 1,800	
Total # of full-time company employees in California: 475	
Company: Garagistic LLC	Priority Industry? 🛛 Yes 🗌 No
Address: 6372 Industry Way	
City, State, Zip: Westminster, CA 92683	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 10	Small Business? 🛛 Yes 🗌 No
Total # of full-time company employees worldwide: 10	
Total # of full-time company employees in California: 10	
Total # of full-time company employees in California: 10         Company: International Business Machines Corporation	Priority Industry? 🛛 Yes 🗌 No
	Priority Industry? 🛛 Yes 🗌 No
Company: International Business Machines Corporation	Priority Industry? 🛛 Yes 🗌 No
Company: International Business Machines Corporation Address: 555 Bailey Avenue	Priority Industry? 🛛 Yes 🗌 No
Company: International Business Machines Corporation         Address: 555 Bailey Avenue         City, State, Zip: San Jose, CA 95141	Priority Industry? Yes No
Company: International Business Machines Corporation         Address: 555 Bailey Avenue         City, State, Zip: San Jose, CA 95141         Collective Bargaining Agreement(s): N/A	
Company: International Business Machines Corporation         Address: 555 Bailey Avenue         City, State, Zip: San Jose, CA 95141         Collective Bargaining Agreement(s): N/A         Estimated # of employees to be retrained under this Contract: 350	
Company: International Business Machines CorporationAddress: 555 Bailey AvenueCity, State, Zip: San Jose, CA 95141Collective Bargaining Agreement(s): N/AEstimated # of employees to be retrained under this Contract: 350Total # of full-time company employees worldwide: 350,000	
Company: International Business Machines Corporation         Address: 555 Bailey Avenue         City, State, Zip: San Jose, CA 95141         Collective Bargaining Agreement(s): N/A         Estimated # of employees to be retrained under this Contract: 350         Total # of full-time company employees worldwide: 350,000         Total # of full-time company employees in California: 4,000	Small Business?  Yes  No
Company: International Business Machines CorporationAddress: 555 Bailey AvenueCity, State, Zip: San Jose, CA 95141Collective Bargaining Agreement(s): N/AEstimated # of employees to be retrained under this Contract: 350Total # of full-time company employees worldwide: 350,000Total # of full-time company employees in California: 4,000Company: Magnetica, Inc.	Small Business?  Yes  No
Company: International Business Machines CorporationAddress: 555 Bailey AvenueCity, State, Zip: San Jose, CA 95141Collective Bargaining Agreement(s): N/AEstimated # of employees to be retrained under this Contract: 350Total # of full-time company employees worldwide: 350,000Total # of full-time company employees in California: 4,000Company: Magnetica, Inc.Address: 2041 139th Street	Small Business?  Yes  No
Company:International Business Machines CorporationAddress:555 Bailey AvenueCity, State, Zip:San Jose, CA 95141Collective Bargaining Agreement(s):N/AEstimated # of employees to be retrained under this Contract:350Total # of full-time company employees worldwide:350,000Total # of full-time company employees in California:4,000Company:Magnetica, Inc.Address:2041 139th StreetCity, State, Zip:Gardena, CA 90249	Small Business?  Yes  No
Company: International Business Machines CorporationAddress: 555 Bailey AvenueCity, State, Zip: San Jose, CA 95141Collective Bargaining Agreement(s): N/AEstimated # of employees to be retrained under this Contract: 350Total # of full-time company employees worldwide: 350,000Total # of full-time company employees in California: 4,000Company: Magnetica, Inc.Address: 2041 139th StreetCity, State, Zip: Gardena, CA 90249Collective Bargaining Agreement(s): N/A	Small Business?  Yes No Priority Industry? Yes No

ALPHABETIZE BY COMPANY NAME

## Self-reported listing of potential employers participating in the contract

Contractor's Name: South Bay Workforce Investment Board, Inc.	CCG No.: ET22-0136
Reference No: 21-0842	Page 3 of 4
Company: Murti, LLC	Priority Industry? 🛛 Yes 🗌 No
Address: 23896 Madison St.	
City, State, Zip: Torrance, CA 90503	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 4	Small Business? 🛛 Yes 🗌 No
Total # of full-time company employees worldwide: 10	
Total # of full-time company employees in California: 10	
Company: Northrop Grumman Systems Corporation	Priority Industry? 🛛 Yes 🗌 No
Address: 1 Space Park	÷
City, State, Zip: Redondo Beach, CA 90278	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 50	Small Business? 🗌 Yes 🛛 No
Total # of full-time company employees worldwide: 85,000	
Total # of full-time company employees in California: 31,000	
Company: Pro-Tech Knives, LLC	Priority Industry? 🛛 Yes 🗌 No
Company: Pro-Tech Knives, LLC Address: 1037 S. Melrose Street, Unit B	Priority Industry? 🛛 Yes 🗌 No
	Priority Industry? 🛛 Yes 🗌 No
Address: 1037 S. Melrose Street, Unit B	Priority Industry? 🛛 Yes 🗌 No
Address: 1037 S. Melrose Street, Unit B City, State, Zip: Placentia, CA 92870	Priority Industry?  Yes No Small Business? Yes No
Address:1037 S. Melrose Street, Unit BCity, State, Zip:Placentia, CA 92870Collective Bargaining Agreement(s):N/A	
Address:1037 S. Melrose Street, Unit BCity, State, Zip:Placentia, CA 92870Collective Bargaining Agreement(s):N/AEstimated # of employees to be retrained under this Contract:10	
Address:1037 S. Melrose Street, Unit BCity, State, Zip:Placentia, CA 92870Collective Bargaining Agreement(s):N/AEstimated # of employees to be retrained under this Contract:10Total # of full-time company employees worldwide:20	
Address: 1037 S. Melrose Street, Unit B         City, State, Zip: Placentia, CA 92870         Collective Bargaining Agreement(s): N/A         Estimated # of employees to be retrained under this Contract: 10         Total # of full-time company employees worldwide: 20         Total # of full-time company employees in California: 20	Small Business? 🛛 Yes 🗌 No
Address:1037 S. Melrose Street, Unit BCity, State, Zip:Placentia, CA 92870Collective Bargaining Agreement(s):N/AEstimated # of employees to be retrained under this Contract:10Total # of full-time company employees worldwide:20Total # of full-time company employees in California:20Company:Space Vector Corporation	Small Business? X Yes No
Address:1037 S. Melrose Street, Unit BCity, State, Zip:Placentia, CA 92870Collective Bargaining Agreement(s):N/AEstimated # of employees to be retrained under this Contract:10Total # of full-time company employees worldwide:20Total # of full-time company employees in California:20Company:Space Vector CorporationAddress:20520 Nordhoff St.	Small Business? X Yes No
Address:1037 S. Melrose Street, Unit BCity, State, Zip:Placentia, CA 92870Collective Bargaining Agreement(s):N/AEstimated # of employees to be retrained under this Contract:10Total # of full-time company employees worldwide:20Total # of full-time company employees in California:20Company:Space Vector CorporationAddress:20520 Nordhoff St.City, State, Zip:Chatsworth, CA 91311	Small Business? X Yes No
Address:1037 S. Melrose Street, Unit BCity, State, Zip:Placentia, CA 92870Collective Bargaining Agreement(s):N/AEstimated # of employees to be retrained under this Contract:10Total # of full-time company employees worldwide:20Total # of full-time company employees in California:20Company:Space Vector CorporationAddress:20520 Nordhoff St.City, State, Zip:Chatsworth, CA 91311Collective Bargaining Agreement(s):N/A	Small Business? Xes No Priority Industry? Yes No

ALPHABETIZE BY COMPANY NAME

# Self-reported listing of potential employers participating in the contract

Contractor's Name: South Bay Workforce Investment Board, Inc.	CCG No.: ET22-0136
Reference No: 21-0842	Page 4 of 4
Company: The Airplane Factory USA	Priority Industry? 🛛 Yes 🗌 No
Address: 3401 Airport Drive	
City, State, Zip: Torrance, CA 90505	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 6	Small Business? 🛛 Yes 🗌 No
Total # of full-time company employees worldwide: 6	
Total # of full-time company employees in California: 6	



**EXPANSION FUNDS** 

**Training Proposal for:** 

# Stationary Engineers Northern California and Northern Nevada Apprenticeship and Training Trust Fund Contract Number: ET22-0911

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: K. Lappen

## PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate Expansion Funds (Alt/Gen)	Industry Sector(s):	Construction (C)
Counties Served:	Statewide	Repeat Contractor:	Priority Industry: ⊠ Yes □ No ⊠ Yes □ No
Union(s):	Yes 🗌 No Stationary Engin	eers Local 3	9, IUOE, AFL-CIO
Turnover R	ate:	≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

## **FUNDING DETAIL**

Program Costs	+	Support Costs	=	Total ETP Funding
\$559,872		\$38,880 8%		\$598,752
In-Kind Contribution:	50% of Total ETP Funding Required			Inherent

## TRAINING PLAN TABLE

Job	Job Description			stimated Range of Hours		Average Cost per	Post- Retention
No.	Job Description		Trainees	Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Commerical Skills	216	8-200	0	\$2,772	\$37.47
	Apprentice			Weighte	d Avg:		
	Priority Rate			144	1		

\*Post Retention Wage is the Contractual Wage

Minimum Wage by County: Job Number 1 (Priority Industry): Expansion Funds requires only
the ETP Minimum Hourly Wage
Health Benefits: Yes No This is employer share of cost for healthcare premiums –
medical, dental, vision.
Used to meet the Post-Retention Wage?: 🗌 Yes 🖾 No 📋 Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation				
Occupation Titles	Actual Wage Range	Estimated # of		
Occupation rules	Actual Waye Malige	Trainees		
Stationary Engineer Apprentice		216		

## **INTRODUCTION**

Stationary Engineers Northern California and Northern Nevada Apprenticeship and Training Trust Fund (Stationary Engineers) was created in 1951 to train stationary engineers who operate and maintain the physical plant systems in buildings such as airports, hospitals, biotech research and manufacturing facilities, food and beverage facilities, and public and private-office buildings. Stationary Engineers maintain equipment in building including boilers, pumps, fans, compressors, refrigeration and air conditioning units, motors, automated controls and electrical apparatus.

Training will be delivered between seven-training centers throughout Northern California with classrooms and laboratories equipped for specialized skills' training. Stationary Engineers is headquartered in San Francisco with the other training sites located in Alameda, Concord, Contra Costa, Fresno, Sacramento, San Francisco, Santa Clara, and Tehama counties. This is Stationary Engineers' third ETP Contract, the third in the last five years.

## Veterans Program

Although Stationary Engineers recruits veterans, a separate Veterans Job Number will not be included under this proposal. Stationary Engineers partners with Veterans Affairs and participates in veteran outreach and hiring activities to recruit applicants. Stationary Engineers screen for veterans and assist them in collecting GI Bill benefits while they are apprentices. Currently, program has one veteran apprentice.

## Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental

Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is four years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90-consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour. The ETP wage for Apprentices is no less than \$26.08 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

## PROJECT DETAILS

Technology in the engineering industry is continually upgrading. Changes to computerized systems, sensor technology, automatic testing, computer controls, and thermostats and the use of computerized building management systems are increasing the complexity of jobs. Engineers are responsible for the safety and operation of all systems within a building, so it is critical that they are trained in new technologies. Engineers must also know how to operate, monitor, maintain, service, and repair multiple types of equipment. As such, training will be delivered in equipment operations, updated-building standards, and green-business practices necessary to meet industry demands.

## Training Plan

Training will be delivered by via Class/Lab and E-Learning in the following:

**Commercial Skills:** This training will be provided to the Apprentices, while receiving training on maintaining and operating plumbing, electrical systems, refrigeration, boilers, compressors, engines, and HVAC equipment. Training will also focus on the operation and maintenance of energy-efficient technologies and products.

## Commitment to Training

ETP funds will not displace the existing financial commitment to training. Signatory employers will continue to make contributions to the Trust for every hour worked by Apprentices. Safety training is provided by participating employers in accordance with all pertinent requirements under state and federal law.

## Training Infrastructure

The Apprenticeship Coordinator (dedicated administrator) will oversee the project. There will be 12 Instructors that will take attendance and forward training documentation to the headquarter office where three Administrative Staff will input the data into the LMS. Stationary Engineers retained a third-party subcontractor, Steve Duscha Advisories, to assist with ETP administration.

## Learning Management System

Staff has reviewed and approved Stationary Engineers' LMS for the use of recordkeeping.

## **Trainer Qualifications**

Stationary Engineers' trainers are experienced journey-level workers who have experience and formal instruction in training methods and subject matter.

#### **Green/Clean Operations**

Apprentices are involved in both green and clean technology in the operation and service of energy-efficient equipment such as advanced HVAC and electrical systems. California Code of Regulations Title 24 requires substantial increases in building efficiency. Green technology within plumbing addresses changes in California to improve water use and potable-water efficiency with water conservation being a key goal. Another area of efficiency is directly servicing water-supply heating, which reduces fuel/electric usage by reducing carbon-based emissions and toxic waste.

#### Impact/Outcome

Trainees will receive training on sophisticated skills that are needed in electronics, plumbing, electrical work, refrigeration, energy efficiency, boilers, compressors, pumps, motors, engines, HVAC equipment, automatic controls, and plant management. In all areas, engineers must know how to operate, monitor, maintain, service, and repair multiple types of equipment. Finally, engineers must be able to document their activities and the functioning of equipment. All skills are taught in the apprenticeship program. Once the training is complete, apprentices will advance to journeyworkers.

#### Marketing and Support Costs

Stationary Engineers is requesting 8% in support costs to conduct marketing through direct mailings, informational flyers, personal contacts, telephone calls, public-service announcements/presentations, emails, and its website. Class information will be disseminated throughout the year to Apprentice and Journeyworkers within the jurisdiction, as well as to the contractors who employ them. Application announcements for the apprenticeship program will be sent to local, state, and federal agencies as well as local high schools, community colleges, and community-based organizations. The Apprenticeship Coordinator will be working with three staff members for marketing, recruiting, needs assessments, and scheduling. Staff recommends the 8% support costs.

## ACTIVE PROJECTS

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0914	\$427,350	10/5/20- 10/4/22	185	0	0

The following table summarizes Contractor's performance under an active ETP Contract:

Stationary Engineers has completed 100% of the training hours in this Contract.

## PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET20-0919	Statewide	8/26/19- 8/25/21	\$721,750	\$703,283 (97%)

Based on CEF systems, Stationary Engineers has earned 97% of the Contract's amount and will invoice for the remaining 3%.

## **DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development at a cost of \$7,500.

## ADMINISTRATIVE SERVICES

Steve Duscha Advisories will also perform administrative services for an amount not to exceed 10% of payment earned of the Contract.

## TRAINING VENDORS

N/A

### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8–200

Trainees may receive any of the following:

### **COMMERCIAL SKILLS**

- Air Conditioning
- Air Conditioning Maintenance and Troubleshooting
- Air Flow
- Basic Electricity
- Biomedical Principles
- Boiler Basics
- Boiler Components
- Boiler Piping
- Charging a System
- Chemical Treatment For Wastewater
- Chemical Use and Safe Handling
- Chilled Water
- Compressors
- Condensers
- Conduction, Convection, Radiation
- Conduit Bending and Wire Pulling
- COVID-19 Hazard Awareness Training
- Drawing Diagrams
- Eaton Controllers
- Electrical Circuits
- Electrical Meters
- Electrical Safety
- Electrical Symbols and Diagrams
- Electricity and Motor Controls
- Electro-Magnetism
- Electron Theory
- Electronic Controls
- Energy Efficiency
- Equipment Operation
- Feed Water Components to Boiler Systems
- Green Buildings
- Handling Equipment That Could Release Ozone Depleting Refrigerants Into the Atmosphere.
- Heat Exchangers
- Heat Pumps
- Identifying Symbols in a Logic Diagram
- Installing and Using Gauges
- Math For Engineers
- Measuring Current
- Medical Equipment Control
- Medical Equipment Maintenance Management
- Micrologic Controllers
- Motors

- Multi-Wire Circuits
- Ohms Law
- Physics of Biomedical Equipment
- Power Factor and Efficiency
- Programming and Troubleshooting Controls
- Programmable Logic Controls
- Protection Devices
- Records and Reports
- Refrigerant Gauges
- Refrigeration
- Refrigeration Cycle
- Refrigeration Maintenance and Troubleshooting
- Repairs and Maintenance
- Safe Working Conditions
- Safety Considerations For Electricity
- Series and Parallel Circuits
- Sewage and Sludge Treatment
- Taking Measurements
- Teco Controllers
- Theory of Heat
- Tools, Hardware, and Test Equipment
- Transformers
- Troubleshooting a Motor Control Circuit
- Troubleshooting Boilers
- Troubleshooting Water Treatment and Wastewater Systems
- Use of Hand Tools
- Using Logic Diagrams
- Using Meters
- Using Nitrogen and Tanks Under Pressure
- Variable Frequency Drives
- Ventilation

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



**EXPANSION FUNDS** 

# **Training Proposal for:**

# Sundt Construction, Inc.

# Contract Number: ET22-0140

Panel Meeting of: November 19, 2021

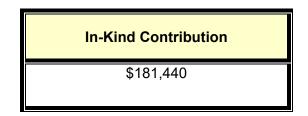
ETP Regional Office: San Diego

Analyst: S. Phillips

## PROJECT PROFILE

Contract	Retrainee		Industry	Construct	tion (C)
Attributes:	Priority Rate		Sector(s):	-	( - )
	Expansion Fund	ds (Alt/Gen)			
				Priority In	ndustry: ⊠Yes          No
Counties	Sacramento, Sa	n Diego	Repeat		
Served:	Orange	an Diego,	Contractor:	ctor:	
Union(s):	🗌 Yes 🛛 No				
Number of	Employees in:	CA: 115	U.S.:1,528		Worldwide: 1,528
Turnover R	late:	9%			
Managers/Supervisors: (% of total trainees)					

## **FUNDING DETAIL**



Total ETP Funding	
\$93,150	

## TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated	•	Range of Hours Class /		Post- Retention
No.	Job Description	Type of Training	raining No. of Trainees		CBT	Cost per Trainee	Wage*
1	Retrainee	Business Skills, Computer Skills,	90	8-200	0	\$1,035	\$25.00
	Priority Rate	Continuous Impr, Commercial Skills, OSHA10/30		Weighte 45	•		

#### \*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Job Number 1: \$19.12/hr. in Orange, Sacramento & San Diego
Counties. However, actual wages paid by the employer will prevail.
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 will not be used to meet the Post-Retention Wage.

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1						
Estimation Field Construction Staff		20				
Engineering Staff		25				
Support Staff		30				
Superintendent/ Front Line Manager		15				

## INTRODUCTION

Founded in 1890 and headquartered in Tempe, Arizona, Sundt Construction, Inc. (Sundt) (<u>www.sundt.com</u>) provides general construction, pre-construction and design services all around the country. The Company also specializes in customized concrete work unique to customer demands. Customers range from commercial to private industries. The Company has offices in Orange, San Diego, and Sacramento Counties.

#### Veterans Program

While the Company doesn't have a formal targeted Veteran program, Sundt encourages veterans to apply. Further, Veterans are given special consideration when they apply.

## PROJECT DETAILS

The construction industry is constantly changing and evolving; this is especially true in light of the COVID-19 Pandemic. The changes range from technological advancements to a stronger focus on sustainability.

As part of its desire to be "ever forward," Sundt is constantly looking for new technologies to improve the way it builds and responds to increasing demands of its customers. The Company is implementing a new Construction Project Management Software called InEight. This new system

will help the Company manage risk, keep projects on schedule and maximize each project budget. The system will provide Sundt's frontline workforce with real-time visibility into metrics, KPIs and trends through connected analytics. The system also has a workflow engine that will allow the Company to manage capital projects and capture and analyze safety, compliance and commissioning data directly from the field, reducing the need for constant rework by 10%. Training will provide the skills necessary to master the new project management software. Further, staff will receive training to adapt to customer demands while in the field through the use of this new technology whilst maintaining safety standards set in place by the state.

Another tool that Sundt is using is augmented reality which links the office and the field with 3D technology. Using digital fabrication, Sundt can transform computer models directly into precise-to-spec building assemblies in the office and send them to frontline staff in the field miles away.

Finally, Sundt will also introduce the use of Drones when managing a project on site. Drones and aerial photography are useful for getting photographs and videos of the landscape. Drones are increasing safety around the job site and can add more information to survey data.

## Training Plan

Training will be provided by in-house staff as well as outside trainers when necessary (OSHA10/30). Training will be conducted in a classroom environment inclusive of some distance training (E-Learning) when appropriate. The proposed training plan will assist the Company in remaining competitive as well as better meet its customers' unique needs when called on.

**Business Skills**: All occupations are expected to receive training in this category as it relates to their job function. The workforce will be able to perform their job functions in the Sundt environment and to provide improved and consistent customer service and support through Business Acumen, Business/Technical Writing Skills, and Finance/Accounting Skills.

**Computer Skills**: All occupations may receive training on systems and computer applications that are applicable to their job role and responsibilities.

**Continuous Improvement**: In a continued effort to provide the best quality and service to its customers, Sundt would like to provide its frontline workers with skills that will increase their performance in the areas of Change Management, Performance Improvement/Management, and Project Planning/Management Skills.

## Certified Safety Training

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

## Commitment to Training

ETP funds will not displace the existing financial commitment to training. The safety of frontline staff is, and will continue to be, a priority in accordance with all pertinent requirements under state and federal law in light of COVID-19. ETP Funding will allow Sundt to deliver necessary training on both safety and the new project management system in a safe manner to all of its employees.

### Training Infrastructure

Training will be delivered by Sundt's in-house trainers and vendors retained as needed for advanced technical software training and safety training. The project will be managed by the Project Controls Manager. Sundt has also retained Training Funding Partners to help with project administration.

#### Impact/Outcome

ETP training will help Sundt provide staff with the training necessary to customize services to its clients. Further, staff will acquire the skills necessary to adapt and respond to unique customer demands whilst in the field working on live projects.

## Record Keeping

Due to COVID-19, Sundt will use an approved alternative recordkeeping process.

## DEVELOPMENT SERVICES

The Company retained Training Funding Partners in Huntington Beach to assist with development of this proposal for a fee not to exceed 6% of the Final ETP Application amount.

## **ADMINISTRATIVE SERVICES**

The Company retained Training Funding Partners in Huntington Beach to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

## **TRAINING VENDORS**

To Be Determined

## Exhibit B: Menu Curriculum

#### Class/Lab Hours/ E-Learning

8-200

Trainees may receive any of the following:

## **BUSINESS SKILLS**

- Business Acumen
- Business/Technical Writing Skills
- Communication Skills
- Front-Line Supervisor Skills
- Finance/Accounting Skills
- Sales/Marketing Skills
- Train-the-Trainer Skills

## **COMMERCIAL SKILLS**

- Artificial Intelligence Skills
- Advanced Safety Skills
- Construction Analytics
- Construction Best Practice Skills
- Contracting Skills
- Electrical/Mechanical Skills
- Project Administration/Costing Skills
- Project Engineering Skills
- Scheduling/Estimating Skills

## **COMPUTER SKILLS**

- Construction Management Software
- Financial/Payment Management Software
- Intermediate/Advanced Microsoft Office Skills
- Learning Platform Navigation Skills
- Microsoft Teams
- Project Management Software Skills

## CONTINUOUS IMPROVEMENT SKILLS

- Change Management Skills
- Leadership Skills
- Performance Improvement/Management Skills
- Process Improvement/Innovation Skills
- Project Planning/Management
- Quality Management Skills
- Time Management Skills

## OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

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



**EXPANSION FUNDS** 

# **Retrainee-Job Creation**

# **Training Proposal for:**

# Synergy Enterprises, Inc.

# Contract Number: ET22-0174

Panel Meeting of: November 19, 2021

ETP Regional Office: PPU-Central Office

Analyst: C. Hoyt

## PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Retrainee Job Creation Initiative Veterans Priority Rate		Industry Sector(s):	Construc Utilities (2		
				Priority Industry: 🛛Yes 🗌No		
Counties Served:	Alameda San Joaquin		Repeat Contractor:	⊠ Yes □ No		
Union(s):	🗌 Yes 🛛 No					
Number of Employees in:		CA: 465	U.S.:555		Worldwide: 555	
Turnover Rate: 17%		17%				
Managers/ (% of total tra	<u>Supervisors</u> : inees)	10%				

## **FUNDING DETAIL**

In-Kind Contribution

\$657,400

Total ETP Funding	
\$448,500	

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of	Rango Hou Class /	rs	Average Cost per	Retention
		Trainees	Lab	CBT	Trainee	Wage*	
1	Retrainee	Business Skills,	290	8-200	0	\$920	\$24.00
	Priority	Comm'I. Skills, Computer Skills, OSHA 10; PL-Comm'I. Skills		Weighte 40	•		
2	Retrainee	Business Skills,	72	8-200	0	\$1,725	\$24.00
	Job Creation	Comm'l. Skills, Computer Skills, OSHA10; PL-Comm'l. Skills		Weighte 75	•	-	
3	Retrainee	Business Skills,	25	8-200	0	\$2,300	\$24.00
	Job Creation Veterans	Comm'l. Skills, Computer Skills, OSHA10;		Weighted Avg: 100			
		PL-Comm'l. Skills					

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1: \$20.86 per hour for Alameda County; \$19.12 per hour for San Joaquin, San Diego, Fresno, and Riverside counties
Job Number 2 (Job Creation): \$17.39 per hour for Alameda Country; \$15.81 for San Diego County; \$15.65 per hour for San Joaquin, Fresno, and Riverside counties
Job Number 3 (Veterans/Job Creation): \$17.39 per hour for Alameda Country; \$15.81 for San Diego County; \$15.65 per hour for San Joaquin, Fresno, and Riverside counties
Job Number 3 (Veterans/Job Creation): \$17.39 per hour for Alameda Country; \$15.81 for San Diego County; \$15.65 per hour for San Joaquin, Fresno, and Riverside counties
Health Benefits: ☐ Yes ☑ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☑ No ☐ Maybe

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

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1 (Retrainees)						
Technician		10				
		163				
Auditor		40				
Consultant		20				
Consultant		30				
Team Leads		27				
Job Number 2 (Job Creation)						
Technician		20				
		30				
Auditor		6				

Consultant	3
Consultant	7
Team Leads	6
Job Number 3 (Veterans/Job Creation)	
Technician	4
	10
Auditor	3
Consultant	2
Consultant	3
Team Leads	3

## INTRODUCTION

Founded in 1981 and headquartered in Hayward, Synergy Enterprises, Inc. (Synergy) is a fullservice energy management organization providing environmental solutions such as water conservation; energy efficient heating, ventilation, and air-conditioning (HVAC); and plumbing to residential and commercial consumers in low income areas in California. The Company also partners with geographic utility companies to drive down carbon emissions, demand on water resources, and grid demand. Synergy is applying for training funds on behalf of itself and its affiliate Synergy EE, Inc. dba Synergy Companies (Synergy EE). Training will be delivered at the Company's six locations in Fresno, Hayward, Perris, San Diego, San Leandro and Stockton. This will be Synergy's second ETP contract and the second in the last five years.

Synergy partners with a Unilateral Apprenticeship Committee, the Plumbing Heating Cooling Contractors of California (PHCC). Apprentices will be participating in Synergy's ETP contract. The training included in this proposal will not duplicate approved Apprenticeship curriculum training. Further, Synergy partners with PHCC by providing its facilities in the central valley as a training location so Apprentices in that area are not required to commute to PHCC's training facility in Sacramento.

## Veterans Program

Synergy has created a marketing campaign aimed at attracting, recruiting, and retraining veterans. The company plans to hire 25 veterans in this proposal (Job Number 3). In order to recruit, Synergy partners with Hire A Vet and Troops To Trades to support its outreach. A portion of the population participating in this project may include transitioning active duty veterans who are within one year prior to their anticipated separation date from service.

## PROJECT DETAILS

Recently, the Company has expanded its product and service offerings to include partnerships with state and local programs offering green energy efficient upgrades to low-income consumers in the Central Valley. This includes green energy products and home installations, home efficiency audits, heat and cooling repair, replacement and tune-ups, poor efficiency or fossil fuel appliance upgrades, and energy efficient and zero carbon emission product installation in homes and communities to help reduce carbon footprint. Training must be provided on these new products and services to meet the demand of the new program. Training in this proposal will focus on technical training for HVAC, plumbing, and new energy efficient standards and technologies to adapt to increasing energy efficiency standards brought on by Title 20 (which focuses on minimum

efficiency levels for energy and water consumption in products, such as consumer electronics, household appliances, and plumbing equipment) as well as Title 24 (which focuses on energy efficiency standards of both new and existing buildings). Training for updated energy efficiency implementation and standards will include whole home efficiency safety testing, retrofit standards and applications, HVAC training, and green energy retrofits air flow testing. Finally, Synergy has purchased new equipment to keep up with industry demand. Recently the company purchased approximately \$156,000 in heat pump water heaters, heat pump furnaces, energy audit equipment, and testing equipment. Further, training will give employees certifications in courses like Natural Gas and Air Ducts that will enable long term portable and transferable skills sets and higher wages.

In addition, the Company's subsidiary, Synergy EE, has secured contracts for wildfire chemical damage remediation. Current wildfire damage is so severe and widespread, Synergy EE must hire 40 full-time employees to meet the demand of the new contracts. These newly hired trainees, most of which will be Technician's, will require over 400 hours of training in the first year of employment. This training will include Waste Products Remediation Planning, Remediation Analytics, and Waste Removal Solutions.

## **Retrainee - Job Creation**

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

The Company has committed to hiring 97 new employees (Job Numbers 2 & 3) to meet the demands of new contracts in the Central Valley. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

## Training Plan

Training will be delivered via Classroom/Laboratory, E-Learning and Productive Lab in the following:

**Business Skills**: Training will be offered to all occupations in Customer Needs Assessment, Communication Skills, Negotiation Skills, Presentation Skills, Innovation Skills and Conflict Resolution.

**Commercial Skills**: Training will be offered to all occupations and focus on new technologies and changes pursuant to Title 24 and Title 20. This will include training on Metering Devices, WiFi Enabled Water Meters, and Trenchless Systems and Tooling. Training will also be provided on program standards and guidelines related to utility contract requirements including green product upgrades. This will include training topics in Nest System Control, Advanced A/C Systems, and Connected Home Technology.

**Computer Skills**: Training will be offered to all occupations and focus on internal software systems. Training topics include Synergy Tech System, proprietary HVAC management software, Microsoft Office Suite, Google Suites, and Tablet Applications for Field Sales and Technician Scheduling and Installation.

## Certified Safety Training

<u>OSHA 10.</u> This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training. The coursework is geared to construction work, and manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

## Productive Laboratory

Training will be provided on new equipment described above. With the new equipment purchase and increasing employer demand for upskill training, Synergy is requesting approximately 100 hours of PL in Commercial Skills for Technicians and Auditors on repairing and diagnosing of HVAC and plumbing systems. PL will allow the Company to train staff to extend technical classroom learning under practical working conditions without creating an excess of waste. PL will also allow trainees to use tools, diagnostics, and other equipment. The Company is requesting a trainer-to-trainee ratio of 1:3 as some training requires a team of three. Synergy's PL training will not duplicate approved Apprenticeship curriculum training.

Training will be led by subject-matter experts with demonstrated knowledge and expertise in the field. Instructors will monitor trainee competencies before the trainee is deemed competent and able to work independently.

## **Commitment to Training**

Synergy invests approximately \$695,500 a year on training per facility and provides basic safety, tool operations, basic system diagnostics, troubleshooting and installation 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

Synergy has a detailed training schedule in place and has successfully facilitated training over the past two years. The HR Director and a support staff at each location will coordinate all training efforts. Additionally, the Company has hired a third-party administrator with extensive ETP administration experience to work closely with staff to complete the project successfully. Training will be delivered by in-house experts and vendors as needed.

#### **Green/Clean Operations**

Synergy is involved within green/clean operations under Title 20 and Title 24. Specifically, Synergy focuses in insulation and nano-air technologies (which reduce the carbon footprint within the AC segment), ducting, and insulation of materials to ensure all new and existing homes and buildings meet specific air quality and energy efficiency standards and regulations.

#### High Unemployment Area

Some trainees in Job Number 1-3 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's locations in San Joaquin and Fresno counties are in an HUA.

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, the Company is not requesting a wage modification.

#### Impact/Outcome

State certifications for trainees upon completion of training include: Controls and Safety Devices, Natural Gas Appliance Testing, Blower door/ weatherization, Air duct testing, and home energy auditing. Each of the aforementioned are separate certifications some trainees will receive; in total these certifications require 100 hours of training.

## ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET20-0195	\$650,095	11/04/19 — 11/03/21	311	377	275

Based on ETP Systems, 35,597 reimbursable hours have been tracked for potential earnings of \$650,095 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through contract closeout.

## DEVELOPMENT SERVICES

Synergy Management Consultants, LLC in Grass Valley assisted with development for a flat fee of \$20,000.

## ADMINISTRATIVE SERVICES

Synergy Management Consultants, LLC will also perform administrative services for a fee not to exceed 13% of payment earned.

## TRAINING VENDORS

Sempra (Southern California Gas & San Diego Gas & Electric), headquartered in San Diego, will provide Energy Efficiency Implementation and Standards training (Commercial Skills) for a fee to be determined.

Fresno Economic Opportunities Commission in Fresno will provide Whole House Energy Efficiency Service training (Commercial Skills) for a fee to be determined.

Other trainers will be identified as they are retained.

## Exhibit B: Menu Curriculum

#### Class/Lab & E-Learning Hours

8-200 Trainees may receive any of the following:

## **BUSINESS SKILLS**

- Principles of Highly Successful Leaders
- Developing SMART Annual Goals
- Pre-Week Planning & Execution
- External Environment Analysis
- Planning and Execution
- Effective Customer Service
- Team Building
- Building Strong Relationships
- Innovation Tools and Processes
- Persuasion Strategies
- Communication Skills
- Negotiation Skills
- Conflict Resolution
- Customer Needs Assessment
- Presentation Skills
- Active Listening Skills
- Understanding and Managing Expectations
- Skills Builder Applications

## COMMERCIAL SKILLS

- Connected Home Technology
- Heat Pump Systems
- System Sizing
- Fundamentals of Air Conditioning Systems
- Advanced A/C systems
- Advanced Diagnosis
- Metering Devices
- Nest System Controls/Smart System
- Advanced Wiring and Schematics
- Nest Thermostats
- Maintenance Tune Up Procedures
- Field Tools/Gauges
- Air Quality Diagnostics
- Inverter Technology
- Ventilation Systems Certifications- Blower Door/ Weatherization
- Certification-Duct Testing
- Certification-Air Filtration
- Certification-NGAT (Natural Gas Application Testing)
- Certification- Home Energy Auditing
- Identifying Waste Products
- Waste Products Remediation Analytics
- Waste Remediation Planning
- Waste Removal Solutions

- Trenchless Systems and Tooling
- Wi-Fi Smart Water Meter
- Driver Safety
- Lifting Safety
- Ladder Safety
- Work Site Safety
- Equipment Safety
- Attic Insulation Safety
- Electrical Hazards Safety

## **COMPUTER SKILLS**

- Synergy Tech System (STS) Software Skills
- Microsoft Office Suite Intermediate Level
- Google Suites
- Zoom Platform
- Tablet Applications
- Trenchless Video x-Ray
- Water Leak Inspection Tools
- Chemical Remediation Software

## <u>OSHA 10</u>

• OSHA 10

#### Productive Lab Hours

0-100 Trainees may receive any of the following:

## **COMMERCIAL SKILLS** (1:3 Ratio)

- Thermal Dynamics
- Switches and Electrical Components
- Heat Pump Systems
- Air Conditioning Systems
- Metering Devices
- System Controls/STS
- Motors
- Whole Home Fans
- Inverter type Systems
- Digital Tools
- Wiring
- Thermostats
- Tune up procedures
- Air Quality diagnostics and methodologies
- Ventilation systems
- Barriers Methodologies
- Diagnostics
- HVAC Maintenance Service
- Drawings/Plans
- Plastic Pipes and Fittings

- Copper Pipe and Fittings
- Cast Iron Pipe and Fittings
- Fixtures and Faucets
- Disposals
- Drains- Roof, Floor and Area
- Valves
- Water Heaters
- On Demand Hot Water Systems
- Pipes and Supply Lines
- Gas and Fuel Systems
- Back Flow Systems
- Sewage and Pump Systems

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

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



EXPANSION FUNDS

# **Training Proposal for:**

# Tile, Marble and Terrazzo Employee Joint Apprenticeship Training Committee Trust

# Contract Number: ET22-0933

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: M. Reeves

## PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Retrainee Apprenticeship	Industry Sector(s):	Construction (C)	
	Veterans		Priority Industry: 🛛 Yes 🗌 No	
	Priority Rate			
Counties	Los Angeles, Orange, San	Repeat		
Served:	Bernardino, Riverside, San	Contractor:	🖂 Yes 🗌 No	
	Diego, Imperial, Kern, San Luis			
	Obispo, Santa Barbara,			
	Ventura			
Union(s): Yes I No Bricklayers and		Allied Craftwo	orkers Local Union No. 4	
Turnover Rate:		≤20%		
Managers/	Supervisors: (% of total trainees)	N/A		

## **FUNDING DETAIL**

Program Costs	+	Support Costs	=	Total ETP Funding
\$225,776		\$16,425 Job Numbers 1 - 2: 8% Job Number 3: 20%		\$242,201
In-Kind Contribution:	50% of	Total ETP Funding Required	ł	Inherent

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per	Post- Retention
				Class / Lab	СВТ	Trainee	Wage*
1	Retrainee	Commercial Skills,	7	8-200	0	\$393	\$30.47
	Journeyworker	OSHA 10/30	Weighted Avg: 16				
2	Retrainee	Commercial Skills, OSHA 10/30	150	8-210	0	\$1,540	\$20.20
	Apprentice		Weighted Avg: 80				
3	Retrainee	Commercial Skills, OSHA 10/30	5	8-210	0	\$1,690	\$20.20
	Apprentice     Octave To root       Veterans     Octave To root		Weighted Avg: 80				

\*Post-Retention Wage is the Contractual Wage

**Minimum Wage by County:** \$19.77 per hour for Los Angeles County; and \$19.12 per hour for all other counties.

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

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

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

Wage Range by Occupation							
Occupation Titles	Actual Wage Range	Estimated # of Trainees					
Job Number 1 - Journeyworker							
Tile Layer, Tile Finisher, Terrazzo Finisher, Terrazzo Worker, Marble Finisher		7					
Job Number 2 – Apprentice							
Tile Layer		6					
		51					
Tile Finisher		37					
		26					
Terrazzo Finisher		5					
		7					
Terrazzo Worker		1					
		2					
Marble Finisher		15					
Job Number 3 – Veteran Apprentice							
Tile Layer		1					
Tile Finisher		1					

Terrazzo Finisher	1
Terrazzo Worker	1
Marble Finisher	1

## **INTRODUCTION**

Tile, Marble and Terrazzo Employees Joint Apprenticeship Training Committee Trust (Tile Marble JATC), with the support of the Bricklayers and Allied Craftworkers Local Union No. 4 (BAC Local 4), trains workers in the tile, terrazzo, brick mason, and marble industry. Tile Marble JATC and its signatories have been training Apprentices since 1966. On-site training takes place at Tile Marble JATC's training center in La Verne and serves employers throughout Southern California. The mission of Tile Marble JATC is to ensure workers have the technical, professional, and safety skills necessary to build and service commercial and residential buildings. This will be Tile Marble JATC's second ETP contract, and the second in the last five years. Tile Marble JATC has also participated under prior ETP agreements with the State Building Trades.

Tile Marble JATC and BAC Local 4 operate under an umbrella trust and train separate occupations under different apprenticeship programs. The occupations trained in this proposal will be Tile Layer, Tile Finisher, Terrazzo Finisher, Terrazzo Worker, and Marble Finisher. Tile Layers and Terrazzo Workers install glass, ceramic and stone tile. Tile Finishers work with the Layers on the installation of ceramic, glass or stone tile. Tile Layers and Terrazzo Workers work includes the laying, cutting or setting of materials used for floors, walls, ceilings, walks, promenade roofs, exterior veneers, stair treads, stair risers, facing, hearths, fireplaces, and decorative inserts. Tile Finishers do most of the setting up of materials and the before and after clean up. Work is both indoors and outdoors and may involve scaffolding.

## Veterans Program

Tile Marble JATC is committed to the recruitment and hiring of Veterans in its program and anticipates training 4 Veterans (Job Number 3) in this proposal. Tile Marble JATC recruits through programs like Helmets to Hardhats and is also an approved GI Bill site. This allows Veterans to receive GI Bill benefits while in training.

The Veteran training curriculum in this proposal will be the same as Apprentice training. These trainees are in a separate Job Number to better track performance toward ETP's goal of improved outreach for veterans.

## Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is 4 years for Tile Layers, 3 years for Terrazzo Workers, and 2 years for Tile Finishers and Terrazzo Finishers. The curriculum is developed with input from DAS and a designated Local Educational Agency, in the case, Hacienda La Puente Unified School District.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500

hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour.

### **First-Year Apprentices**

Tile Marble JATC is requesting an exception to allow first-year Apprentice Finisher occupations to participate as permitted under existing ETP Apprenticeship Training guidelines for a 24-month program. Under ETP Apprenticeship Guidelines, an exception may be made for trainees who have advanced to Year 1, Period 2 when the apprenticeship program is less than or equal to 24 months.

The JATC does not separate the apprentices into different levels depending on their year. Instead, trainees are allowed to select from different sets of courses that correspond to their areas of interest. In addition, a trainee can be a first-year in course work, but be a second-year in work status or, on the other hand, a trainee can be a second-year in course work, but a first-year in work status. This is because the JATC gives credit if a trainee comes into the JATC with work or course experience. Hence the line between first and second year Apprentice Finishers is not clear cut, which makes eligibility into the ETP program difficult to determine.

## PROJECT DETAILS

Trainees will receive training in updated building standards and green business practices necessary to meet employer requirements to develop and retrofit buildings with greener materials. Trainees will learn to work more efficiently with the materials, thus reducing scrap and re-work. The commercial training will help employers manage their costs by sending well-prepared workers out on jobs.

Additionally, demand for Tile and Marble workers increased 25 percent from 2010 to 2020. Population and business growth, coupled with the increasing popularity of tile and marble, are key drivers of demand for tile, terrazzo and marble workers. Tile and natural stone are used heavily in shopping malls, hospitals, schools, and restaurants, as well as other commercial and government buildings. Tiles, including those made of glass, mosaic, and other high-end tiles and marble, are also becoming more popular, particularly in new and remodeled homes. Current projects for Tile Marble JATC include The Grand LA, George Lucas Museum, LAX ConRAC, San Manuel Casino, and Chino High School.

## Training Plan

Training will be provided via Class/Lab and E-Learning delivery methods in the following:

**Commercial Skills**: Training will be offered to all occupations. Courses include hands-on experience in Safety Procedures, Use of Equipment, Layout Techniques, Blueprint Reading, Installing Specialty Jobs, Preparation of Walls, Preparation of Floors, Installing all types of Ceramic, Porcelain and Stone Tile, and Project finishing/fine details (Grouting and Clean-up).

## Certified Safety Training

<u>OSHA 10/30</u>: This training will be provided to all trainees and is a series of courses "bundled" by industry sector and occupation. The coursework is geared to construction work and manufacturing. Completion of the training results in a certificate that expands employment

opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

# E-Learning and Alternate Recordkeeping

To keep up with the demand for highly-trained, highly-skilled workers, it is critical for Tile Marble JATC to offer classes via E-learning and in-person as the state continues to recover from the COVID-19 pandemic. All classes held onsite at the Training Center must follow current pandemic safety guidelines. For E-Learning courses, Tile Marble JATC has provided trainees with new computers to ensure Apprentices can attend classes via E-Learning. Accordingly, Tile Marble JATC is requesting alternate recordkeeping for project administration purposes.

# Marketing and Support Costs

Class information is disseminated to apprentices, journeyworkers, and contractors through direct mailings, personal contacts, telephone calls, public service announcements, emails, and the Tile Marble JATC website. Application announcements for the program are circulated to local, state and federal agencies, high schools, community colleges, and community-based organizations.

Tile Marble JATC requests and staff recommends 8% support costs for Job Numbers 1 and 2, and 20% support costs in Job Number 3 (Veterans).

# Commitment to Training

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

# Training Infrastructure

Training will be overseen by Tile Marble JATC's Training Coordinator. Three JATC office staff will assist with scheduling of training, recruitment, need assessments, and program administration. Three trainers and the Training Coordinator will provide the training. Tile Marble JATC has also retained a third-party administrator to assist with ETP project administration.

# **Trainer Qualifications**

Tile Marble JATC trainers are experienced Journeyworkers who are former or current Tile Finishers or Layers.

#### Impact/Outcome

Certificates earned by Journeyworkers and Apprentices may include: OSHA 10/30, Forklift, Scaffold User Card, and Advanced Certification for Tile Installers.

# **Tuition Reimbursement**

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

# ACTIVE PROJECTS

The following table summarizes performance by Tile Marble JATC under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0953	\$101,255	09/08/20 – 09/07/22	91	TBD	TBD

Based on ETP Systems, 2,256 reimbursable hours have been tracked for potential earnings of \$43,713 (43% of approved amount). The Contractor projects final earnings of 100% based on training delivered to date and in progress through project closeout.

# **DEVELOPMENT SERVICES**

California Labor Federation in Oakland and Strategy Workplace Communications in Alameda assisted with development at no cost.

# ADMINISTRATIVE SERVICES

Strategy Workplace Communications will also perform administrative services for a fee not to exceed 13% of payment earned.

# TRAINING VENDORS

N/A

# Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200 (Job Number 1)

Trainees may receive any of the following:

#### Journeyworker

#### **COMMERCIAL SKILLS**

• ACT - Advanced Certificates for Tile Installers

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

- OSHA 10
- OSHA 30

#### Class/Lab/E-Learning Hours

8-210 (Job Numbers 2 & 3)

Trainees may receive any of the following:

# Apprentice

#### COMMERCIAL SKILLS Marble Worker

- Bull Nosing
- Caulking
- Cleaning, Polishing and Sealing
- CPR/First Aid
- Cutting & Grinding
- Detail cut & Color Theory
- Drilling & Anchoring
- Edge Detail
- Fabrication
- Grouting with a Grout Bag
- Grouting with Epoxy
- Holding String Lines and Chalk Lines
- Lath & Scratch
- Material Handling
- Polishing
- Repair & Restoration
- Shower Pans
- Slurrying & Roughing-in Large Floors
- Square Footages & Room Setup
- Squaring & Straightening
- Trim Shapes
- Types of Tile
- Use of Tools- Hand & Power
- Waterproofing

# 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

# <u>Tile Worker</u>

- Blueprint Reading
- Bull Nosing
- Caulking
- Cleaning, Polishing and Sealing
- Commercial Room Layout #1 and #2
- 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
- Large Form Tile Installation (LFT)
- Gauged Porcelain Tile/Slab Installation
- 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
- Wet & Dry Grinding Cement Terrazzo Floors, Walls & Base

# All Trades

• GPT/S Material Handling

# OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Number 1, and Apprentice training is capped at 210 total training hours per trainee in Job Numbers 2 & 3, regardless of the method of delivery.



# **EXPANSION FUNDS**

# **Training Proposal for:**

# UFCW Northern California Meat Apprenticeship Trust Fund

# Contract Number: ET22-0920

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: S. Phillips

# PROJECT PROFILE

Contract	Retrainee	Industry	Services (G)	
Attributes:	Apprenticeship	Sector(s):	Retail (44-45)	
	Veterans			
	Expansion Funds (Alt/Gen)			
			Priority Industry: 🗌 Yes 🛛 No	
Counties		Repeat		
Served:	Northern California	Contractor:	Yes 🗌 No	
Union(s):	Yes No United Food & Commercial Workers Union (Local 5 and Local 8)			
Turnover Rate:		≤20%		
Managers/Supervisors: (% of total trainees)		N/A		

# **FUNDING DETAIL**

Program Costs	+	Support Costs	=	Total ETP Funding
\$266,976		\$19,890 Job Number 1: 8% Job Number 2: 20%		\$286,866
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 Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Apprentice	Commercial Skills	98	8-200 Weighted 144	•	\$2,772	\$14.50
2	Retrainee Veterans Apprentice	Commercial Skills	5	8-200 Weighted 144	-	\$3,042	\$14.50

#### \*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Job Numbers 1-2: The Post-Retention Wage is based on the union-
negotiated wage
Health Benefits: Yes No This is employer share of cost for healthcare premiums –
medical, dental, vision.
Used to meet the Post-Retention Wage?: 🗌 Yes 🖾 No 🗌 Maybe

Wage Range by Occupation					
Occupation Titles	Actual Wage Range	Estimated # of Trainees			
Job Number 1:					
Apprentice Meat Cutter		98			
Job Number 2:					
Veteran Apprentice Meat Cutter		5			

# INTRODUCTION

Founded in 1949 and headquartered in Hayward, UFCW Northern California Meat Apprenticeship Trust Fund (UFCW Meat Trust) (<u>www.ufcw5.org</u>) seeks training funds for 104 new and continuing apprentices in the retail and wholesale meat-cutting industry. UFCW is a non-traditional Apprenticeship program. The term "non-traditional" is used by the Division of Apprenticeship Standards (DAS) for other industry sectors such as Retail Food, Machining, Automotive and Healthcare.

The current program sponsored by UFCW Northern California Meat Joint Apprenticeship Committee (JAC) was formed by a merger of three separate Joint Apprenticeship Training Committees (JATC) in Local 5 and Local 8: Humboldt & Del Norte Meat Cutters; Oakland & Vicinity Meat Industry; and, Santa Clara County Meat Cutters. This merger was approved by DAS in late 2014. Individual employers negotiate directly with UFCW, as expressed in a Master Agreement (Safeway MOU).

The JAC serves 48 counties throughout Northern California. UFCW Meat Trust will deliver training at the following seven locations: Hayward, San Jose, South San Francisco, Novato, Modesto, Roseville, and Martinez (a new location). This will be the fourth ETP Contract with UFCW Meat Trust; the fourth in the last five years. Funding is for Apprentice training only.

#### Veterans Program

UFCW Meat Trust has committed to training 5 Veteran Apprentice Meat Cutters (Job Number 2). Since 2008, UFCW Meat Trust has been working with the Department of Veterans Affairs to train veterans. UFCW Meat Trust has been developing and operating its training program with a focus on the recruitment of veterans.

# Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the DAS. ETP funding supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training following a year of entry-level "meat clerk" training to learn the rudiments pertinent to one occupational specialty (Meat Cutter). Apprenticeship programs vary in length. In this project, the program is a one-year apprenticeship program. Normally, first-year Apprentices are not eligible due to the higher drop-out rates associated with the entry-level trainees. With a one-year program as described here, that eligibility standard is waived.

For the trades, including Retail Food, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour. The ETP wage for Apprentices is no less than \$34.77 per hour (with health benefits per the CBA) for a non-priority industry (Retail Food). In the event wages for Apprentices are below SET, as in this proposal, the Panel recognizes the union-negotiated CBA wage. The actual wages paid are shown in the Wage Range by Occupation table for the Panel's information.

# PROJECT DETAILS

Apprentices are full-time permanent employees with a given signatory employer, such that on-thejob training totals 4,160 hours over the course of two years (including one year as a Meat Clerk). Wages for both Apprentices and Meat Clerks are proportionate to journey-level Meat Cutters with advancements at each six-month period. RSI begins in the second year, as noted above, after the Meat Clerk has been accepted into the apprenticeship program.

ETP will fund RSI, which is delivered as classroom training. Standard RSI for this program is 144 hours. However, ETP will also fund ancillary RSI, up to the 200-hour cap per-trainee. The training curriculum was developed with input from the national UFCW and the signatory employers.

# **Employer Demand**

Signatory employers need Apprentices skilled in food-safe handling practices consistent with Federal & Drug Administration (FDA) standards. Employers also require familiarization with new technologies, equipment, and materials affecting the industry. There has also been an increase in demand for meat-management (commercial) skills to reduce waste in expensive product, re-work and job delays while meeting employer needs in the competitive retail-food industry. The increase in demand is also affected by retiring of Journey-level meat cutters, as well as opening of new stores in Martinez, Fresno and Ukiah and expansion of other stores thoughout Northern California.

# Training Plan

**Commercial Skills:** Meat Cutters will receive training on operational skills including the following: Supermarket Math (necessary to help trainees understand gross/net profit and labor percentage); Safeway (not specific to Safeway Stores); safety training-working safely with knives/power equipment, proper lifting techniques, proper knife sharpening; and History of Sanitation (overview of government oversight of the meat industry including handling/sanitary clean-up procedures).

Courses in meat- Beef, Pork, Lamb, and Veal will be delivered to properly inspect, grade, and cut meats while providing an overview of cooking/nutritional values. Sausage making courses will be delivered to provide an overview of the types of sausages, casings, and cooking/nutritional values.

Seafood courses will provide an overview of farm-raised versus wild seafood. A Country of Origin Labeling (COOL) course will inform trainees of the labeling of seafood. An overview of cooking and nutritional values for seafood will be delivered, as well.

# 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

UFCW Meat Trust's Joint Apprenticeship Committee (JAC) Director will be the dedicated administrator for this project. The JAC Chairman (Santa Clara) and one administration staff member will assist with the ETP project. UFCW Meat Trust has five in-house instructors to deliver ETP-funded training. These trainers are required to have ten-plus years of experience in the industry, and they are subject-matter experts (journey-level Meat Cutters).

# Impact/Outcome

Successful completion of the apprenticeship program will result in journey-level status as certified by DAS.

# Marketing and Support Costs

UFCW Meat Trust engages in outreach and recruitment activities with a special focus on increasing participation by ethnic minorities and women. It will sponsor workshops, seminars, and other informational meetings with assistance from employment and educational agencies.

The JAC's union and employer representatives also participate in job fairs, school-career days, and meetings with minority and women organizations. JAC representatives will explain the program's opportunities and assist with the "meat clerk" application process. Over the last five years, a 99% graduation rate for minorities and women was reported at the JAC's headquarters in Hayward.

JAC outreach also includes the Employment Development Department (EDD), the Division of Apprenticeship Standards (District Offices), and the County Superintendent of Schools covering multiple counties and colleges. The JAC participates at EDD workshops to recruit veterans.

Furthermore, the JAC regularly evaluates training by obtaining employer feedback while revising the curriculum and other aspects of training as warranted through DAS. Staff recommends Support Costs of 8% for these purposes for Job Number 1 and 20% support costs for marketing and outreach for Job Number 2 (Veterans).

#### **Tuition Reimbursement**

UFCW Meat 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 Contract.

# PRIOR PROJECTS

The following table summarizes Contractor's performance by UFCW Meat Trust under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0939	Northern California	4/08/2019- 7/06/2021	\$197,274	\$197,274 (100%)
ET18-0900	Northern California	8/22/2017- 8/21/2019	\$126,126	\$121,916 (96%)
ET15-0924	Northern California	4/06/2015- 4/05/2017	\$125,100	\$125,100 (100%)

Based on ETP Systems, UFCW Meat Trust has tracked training hours for potential earnings of \$197,274 (100% of approved amount).

# **DEVELOPMENT SERVICES**

N/A

# **ADMINISTRATIVE SERVICES**

N/A

# TRAINING VENDORS

N/A

# Exhibit B: Menu Curriculum

#### Class/Lab/ E-Learning Hours

8-200 Trainees may receive any of the following:

# **COMMERCIAL SKILLS**

#### Safeway (not specific to Safeway Stores)

- Working Safely with Knives and Power Equipment
- Proper Lifting Techniques
- Proper Knife Sharpening
- Meat Safety (Cutting)
- Customer Service
- Shopper Demands
- Displaying meat
- Animal Loss Factors
- Block Ready Cuts
- Holiday Cooking Methods
- Smoked Meat Skills
- Retail cuts

# Supermarket Math

- Understanding Gross/Net Profit and Labor Percent
- Math Conversion Factors
- Percent Sales
- Sales & Purchasing
- Department Sales Salary Worksheet
- Sales to Purchase Logging
- Operation Statement Concepts
- Market Labor Practices
- Inventory
- Store Management: Scheduling, Ordering & Personnel Management

# History of Sanitation

- History of Apprenticeship
- The Jungle (History of Government Oversight)
- HACCP (Hazard Analysis & Critical Control Points)
- Proper Clean-Up Procedures
- Sanitation Practices, Refrigeration and Handling of Meat
- Food Workers Hazards
- E-Coli and Other Bacterial Contamination
- Meat Inspection
- Meat By-Products
- Preservation/ Storage of Meat
- Meat Cures & Smoking
- Safe Handling Practices

# <mark>∔ Beef</mark>

- Identification, Inspection and Grading Breeds of Cattle
- Proper Beef Anatomy & Cuts
- Cooking and Nutritional Values
- Beef Quarters
- Box Beef IMPS (Codes)

# <mark>∔ Pork</mark>

- Changes in the Pork Industry
- Proper Pork Cuts & Classification
- Cooking and Nutritional Values
- Kosher Meats

# Lamb and Veal

- Distinguishing Lamb from Veal
- Proper Lamb/Veal Cuts & Classification
- Cooking and Nutritional Values

# Sausage Making

- History
- Types of Sausages
- Castings
- Cooking and Nutritional Values

# Seafood

- Farm Raised vs. Wild
- COOL (Country Of Origin Labeling)
- Cooking and Nutritional Values

# Poultry

- Poultry Cutting
- Turkey Handling
- Turkey Cooking

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



**EXPANSION FUNDS** Training Proposal for:

# Unical Aviation, Inc.

# Contract Number: ET22-0134

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: K. Hernandez

# PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Priority Rate		Industry Sector(s):	Manufact	turing (E)
	Retrainee HUA			Driority In	ndustry: 🖂Yes 🗌No
Counties Served:	Los Angeles, San Bernardino		Repeat Contractor:	⊠Yes □No	
Union(s):	🗌 Yes 🖾 No				
Number of Employees in: CA: 358		CA: 358	U.S.: 368		Worldwide: 373
Turnover Rate:		46%	See Narrati	ve when o	ver 20%
Managers/Supervisors: 10%		10%			

# **FUNDING DETAIL**

In-Kind Contribution	
\$585,200	

Total ETP Funding
\$354,200

# TRAINING PLAN TABLE

Job	Job No. Job Description Type of		Estimated No. of	Range of Hours		Average Cost per	Post- Retention
No.			Trainees	Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Business Skills, Comm'l Skills,	170	8-200	0-60	\$1,610	\$19.77
	Priority Rate	Computer Skills, Cont. Imp., HazMat, PL-Comm'I Skills		Weighted Avg: 70			
2	Retrainee Priority Rate HUA	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., HazMat, PL-Comm'l Skills	50	8-200 Weighte 70	•	\$1,610	\$16.00

#### \*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1: \$19.77 per hour in Los Angeles County;					
Job Number 2 (HUA) \$16.00 per ho	our in San Bernardino County.				
Health Benefits: 🖂 Yes 🔲 No	This is employer share of cost for healthcare premiums –				
medical, dental, vision.					

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occ	upation	
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Job Number 1		
		20
Mechanic/Technician/Warehouse Staff		40
		40
		2
Operations Staff		2
		16
Engineering/Information Technology Staff		8
Engineering/Information Technology Staff		12
Sales Staff		2
Sales Stall		8
Managers		20
Job Number 2 (H	UA)	
Mechanic/Technician/Warehouse Staff		13
		15

	15
	1
Operations Staff	2
	2
Managers	2

# INTRODUCTION

Founded in 1990 and located in the City of Industry, Unical Aviation Inc. (Unical) supplies aircraft parts and components to the aerospace industry from a 500,000sq ft. facility. The Company also assists its customers with part and component repair product lifecycle focused on heavy maintenance repair, daily repair, component repair and engine services. The Company has built partnerships with aerospace part suppliers all around the world, accumulating a massive inventory of parts. The Company provides its products to over 3,500 customers worldwide including major airlines and defense contractors.

Unical's world headquarters houses its four separate companies, Unical, Unical UMRO, Inc. (UUMRO), Unical 145, Inc. (U145), and Unical Aero, Inc. (U-Aero). These entities have the same California Employer Account Number and trainees from these four companies will participate in this ETP contract. Unical provides spare aircraft parts and services that meet a comprehensive range of aviation industry demand; UUMRO (Job Number 2 HUA) located at the San Bernardino Airport provides aircraft parking, teardown and demolition services. U145 provides FAA 145 repair for a variety of platforms including mechanical and hydraulic accessories, aero structures and landing gear overhauls. U-Aero is a U.S. based engineering, certification and manufacturing company of FAA-PMA/STC approved aircraft parts, components and systems for commercial applications.

#### Veterans Program

Although this project does not include a Veterans component, the training population of Unical may potentially include Veterans. The Company welcomes veteran applicants for open positions.

# PROJECT DETAILS

Unical and the entire aviation supply chain industry was hit hard by the COVID-19 pandemic. When COVID-19 first emerged, passenger air travel came to a near standstill due to the need for social distancing and international travel restrictions to contain its rapid spread. Although this project does not include a Job Creation component, Unical is attempting to rehire many of its employees laid off due to the pandemic, and recently provided wage increases to all of its hourly employees to help support the future growth of the Company and build employee morale. The Company has hired 32 new hires in 2021 thus far and has 30 open requisitions. The Company has plans to add approximately 75 net new employees to its current base during the two year term of the ETP Contract.

Before the pandemic, Unical experienced a 15-20 percent growth in each of its previous seven years. The UMRO business unit was previously more of a support role to the Unical Aviation business unit. However, when the pandemic hit, it required UMRO to pivot its business model from a support organization to a revenue builder. The Company shifted its workforce during the pandemic and increased support to its biggest customer, Delta Airlines. Since January 2021, Unical has expanded its revenue at UMRO by 70 percent due to the rapidly expanding services it now offers related to storage for a major customer's preservation and return to service

capabilities and is continuing its growth having just entered into a large service program to service dozens of new aircraft over a multi-year timespan.

Unical is planning to implement a new software called Laserfiche, which will impact several projects to improve business processes. Laserfiche helps with content management, business process automation, productivity-boosting data analytics, and online forms which will eliminate the use of paper forms across Unical. All employees will require supplemental skills training relative to the changes and process improvements in their respective business areas.

In addition, Unical is in the process of implementing new modules for its current Enterprise Resource Planning (ERP) system. These new modules include a more seamless time and attendance module within its work order management ERP to integrate with its current HR system and a mobile technician module to help improve the efficiency and productivity of its Mechanic/Technician/Warehouse Staff to help the Company continue to compete globally.

#### Turnover Rate Waiver

The ETP program is designed to fund training for stable, secure jobs. Thus, the employer's turnover rate cannot exceed 20% annually for the facility where training is requested. But the Panel may accept a higher turnover with evidence training will significantly decrease the turnover, or the employer experienced a singular reduction in workforce, or industry data supports a higher turnover rate. The Panel may, or may not choose to, impose a "turnover penalty" when the company crosses this 20% threshold.

If the Panel chooses to impose a turnover penalty, failure to stay under a maximum rate will trigger forfeiture of 25% of the amount earned for each trainee. The maximum rate is typically 20%, as measured by turnover during the 12-month period preceding termination of the ETP Contract.

The Aviation industry was hit hard by the COVID-19 pandemic. Many planes were grounded with the steep decline in air travel and this resulted in a drastic decrease in customer orders for Unical. In response, Unical implemented a variety of workforce strategies to retain as many employees as possible. These strategies included temporary reduction in work hours, temporary reductions in wages, temporary furloughs, utilizing the state's workshare unemployment assistance program, and a one-time layoff. Even with these strategies employed, the involuntary turnover rate for Calendar year 2020 was 46%. This turnover rate is a drastic increase from Unical's historical involuntary turnover rates. Prior to the pandemic the Company's turnover rates were 2% for 2017, 2% for 2018, and 1% for 2019.

Therefore, although the ETP turnover rate exceeds 20% annually as included in Section 4417, this proposal does not impose a turnover penalty, as the turnover rate here for 2020 was primarily due to the pandemic.

# Training Plan

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

**Business Skills**: Training will be provided to Operations Staff and Managers and focus on increasing productivity and efficiency by building skills around Audit Skills, Technical Writing Skills and Supply Chain Management.

**Commercial Skills**: Training will be provided to Production and Operations Staff in the critical skills needed for Aircraft Inspection/Testing Skills, Aviation Electrical Skills and Engineering.

**Computer Skills**: Training will be provided to all occupations to effectively utilize Enterprise Resource Planning System, Microsoft Project.

**Continuous Improvement**: Training will be provided to all occupations and focus on Change Management Skills, Project/Program Management Skills and Resource Planning.

# **Certified Safety Training**

<u>Hazardous Materials (HAZMAT)</u>. This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Mechanic/Technician/Warehouse Staff will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not yet been determined.

#### **Productive Laboratory**

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

Due to the nature of Unical's business, there are many skills that must be learned with hands-on experience. PL training would allow for practical, real world experience that cannot be duplicated in a classroom setting. Classroom instruction is an inadequate and ineffective learning method of training for Production Staff because of the complex equipment to be trained on. In addition, the equipment is too large to be brought into a classroom and it is very expensive. PL training is required for Production Staff to assure comprehensive training in Commercial Skills.

Trainees will be under direct trainer supervision at all times. The trainer will impart knowledge, observe, verify comprehension, and submit appropriate training documentation. Unical requests a PL trainer-to-trainee ratio of 1:2 as a small percentage of PL training is currently delivered in small teams of 2 in the field. This is the most efficient training method for staff in the field. Approximately 143 Mechanic/Technician/Warehouse Staff trainees will receive up to 60 PL hours in the following equipment: Arbor Press, manual hand punch, sheet metal notcher, hydraulic press brake, cold cut saw, various cranes/lifts, Binks electric oven, rotor blade balancing equipment, landing gear removal equipment, engine removal equipment and Speed lathe.

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

CBT training will be provided as an extension to Classroom/Lab training. This additional training will ensure trainees are increasing the retention of information received from the Classroom/Lab training. CBT training will focus on critical Business and Commercial Skills in Federal Aviation Regulation and Personal Protective Equipment safety training.

#### High Unemployment Area

Trainees (Job Number 2) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. UUMRO's location in San Bernardino is in an HUA.

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. Uncial is requesting the HUA wage modification for these trainees, from \$19.12 to \$16.00 per hour.

# Temporary to Permanent Hiring

Unical will train fifteen Mechanic/Technician/Warehouse Staff (Job Number 1 and five Mechanic/Technician/Warehouse Staff (Job Number 2), under Panel guidelines for the Temporary-to-Permanent program with the intention on hiring them fulltime. No progress payments will be taken on temp-to-perm trainees until the trainee is hired fulltime and retained on the job for 90 days. The average time for converting temporary workers into full-time permanent employment is three months. Trainees will not receive employer paid health benefits while temporary employees. However, the trainees will be eligible for employer paid health benefits after 60 days.

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

# Commitment to Training

In 2020 Unical invested approximately \$465,000 for training in basic new-hire orientation, antiharassment, diversity and required OSHA. In addition, it provides first aid/CPR/AED and other related training. ETP training will help Unical implement a new curriculum, related to new products, processes and rapid growth. 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

Unical retained Training Funding Partners (TFP) to provide administrative support. The Vice President of Human Resources will administer the project. The Company's training staff will work with the TFP team to coordinate enrollment, update ETP systems, verify retention, and ensure compliance with all ETP requirements. Each location has a staff person assigned to help coordinate training.

# Electronic Recordkeeping/LMS

Unical has requested to utilize electronic recordkeeping. ETP staff has reviewed and approved the Company's learning management system.

# PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0129	City of Industry	9/1/2018 - 11/29/2020	\$608,450	\$582,345 (95%)

# **DEVELOPMENT SERVICES**

The Company retained Training Funding Partners in Huntington Beach to assist with development of this proposal for a flat fee of \$28,500.

# ADMINISTRATIVE SERVICES

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

# **TRAINING VENDORS**

To Be Determined

# Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8 – 200

Trainees may receive any of the following:

# **BUSINESS SKILLS**

- Audit Skills
- Business Process Skills
- Technical Writing Skills
- Contract/Negotiation Skills
- Customer Service/Communication Skills
- Documentation Skills
- Marketing/Sales Skills
- Supply Chain Management/Inventory Control
- Train the Trainer Skills

# **COMMERCIAL SKILLS**

- Advanced Safety Skills
- Aeronautical Parts and Materials
- Aircraft Assembly/Disassembly/Repair Skills
- Aircraft Inspection/Testing Skills
- Aircraft Maintenance/Equipment Skills
- Aircraft Purchase/Acquisition Skills
- Aviation Electrical Skills
- Engineering Skills
- Foreign Object Debris (FOD) Identification Skills
- Work Instruction Skills

# **COMPUTER SKILLS**

- Computer Programming/Software Development Skills
- Document Sharing Process System
- Enterprise Resource Planning System
- Intermediate/Advanced MS Office Skills (Word/Excel/PowerPoint)
- Laserfiche System
- Quantum System Skills
- Unical Proprietary System/Software Skills

# **CONTINUOUS IMPROVEMENT**

- Change Management Skills
- Conflict Management Skills
- ISO Standards
- Leadership/Coaching Skills
- Performance Improvement/Management
- Process Improvement/Lean-Six Sigma Skills
- Project/Program Management Skills
- Quality Assurance/Quality Control
- Risk Management Skills
- Strategic Thinking Skills
- Team Building Skills
- Troubleshooting Skills

#### HAZARDOUS MATERIALS

- Hazardous Materials/Hazard Communication Skills/Gases
- Transportation of Dangerous Goods

# **Productive Lab Hours**

0 - 60

# COMMERCIAL SKILLS (Ratio 1:2)

- Advanced Safety Skills
- Aeronautical Parts and Materials
- Aircraft Assembly/Disassembly/Repair Skills
- Aircraft Inspection Skills
- Aircraft Maintenance/Equipment Skills
- Aircraft Purchase/Acquisition Skills
- Aircraft Testing Skills
- Aviation Electrical Skills
- Engineering Skills
- FAA Guidelines
- Foreign Object Debris (FOD) Identification Skills
- Hydraulics
- Work Instruction Skills

# CBT Hours

0 - 60

# **BUSINESS SKILLS**

- Advanced HR Management: Competencies for Senior HR
   Professionals Part I and Part II (1.25 hr)
- Advanced Human Resources Management: Workplace and HR Strategy (2.25 hr.)
- Attention to Detail: Definition and Examples (30 min.)
- Conducting Professional Interviews (30 min.)
- Coronavirus and Working from Home (Global) (30 min.)
- Creating Valuable Customer Relationships (1 hour)
- Dealing with Difficult People and Situations (30 min.)
- Dealing with Drug and Alcohol Abuse... for Employees (30 min.)
- Dealing with Drug and Alcohol Abuse... for Managers and Supervisors (2 hr.)
- Delegation Skills (30 min.)
- DOT: Reasonable Suspicion (Drug and Alcohol Awareness) (2 hr.)
- Efficient Delegation (30 min.)
- Employee Discipline (30 min.)
- Ethics & Code of Conduct for Supervisors (30 min.)
- Evaluating Candidate Responses (30 min.)
- Extreme Ownership (4 hrs)
- Franklin Covey Leadership Courses (20 hrs)
- How to Write Effective Job Descriptions (30 min.)

- HR Competencies: Global and Cultural Effectiveness and Communication (30 min.)
- Importance of Communication for Aircraft Techs (.33 hrs)
- Interviewing Basics (30 min.)
- Keys to Remote Accountability (30 min.)
- Lawful Hiring (30 min.)
- Managing Multigenerational Employees (30 min.)
- Managing the Front Desk (1 hr)
- Organizational Skills at Work (30 min.)
- OSHA Recordkeeping for Managers and Supervisors (30 min.)
- Preventing Workplace Violence for Supervisors (30 min.)
- Recognizing Behavior Responses (30 min.)
- Strategic Delegation (30 min.)
- The Blended Interview Process (30 min.)
- The Legal Aspects of Interviewing (30 min.)
- Unical Return to Work Post-Covid (.25 hr.)
- Wage and Hour for Supervisors California Edition (1 hour)
- Working with Data (30 min.)

# **COMMERCIAL SKILLS**

- Detecting and Reporting Suspected Unapproved Parts (.33 hours)
- Electrical Safety (.83 hours)
- FAA Employee (1 hour)
- Fatigue Management (.5 hours)
- Federal Aviation Regulation Part 1 Definitions and Abbreviations (.83 hrs)
- Federal Aviation Regulation Part 145 Sub Sections 211 and 213 Reviewed (.25 h)
- Federal Aviation Regulation Part 145 Subpart C (.5 hours)
- Federal Aviation Regulation Part 145 Subpart D (.5 hours)
- Federal Aviation Regulation Part 145 Subpart E (.33 hours)
- Federal Aviation Regulation Part 39 Airworthiness Directives (.5 hours)
- Federal Aviation Regulation Part 43 A Repair Station Perspective (.83 hours)
- Federal Aviation Regulation Part 65 A Repair Station Perspective (.83 hours)
- Foriegn Object Debris/Damage (1 hour)
- Fork Lift Physics (.5 hours)
- Know Your Lift Truck (.75 hours)
- Lift Truck Safety (.5 hours)
- Personal Protective Equipment Foot Protection (.25 hours)
- Personal Protective Equipment Hand Protection (.5 hours)
- Personal Protective Equipment Head Protection (.33 hours)
- Personal Protective Equipment Hearing Protection (.5 hours)
- Personal Protective Equipment Respiratory Protection (.5 hours)
- Personal Protective Equipment-Eye and Face Protection (.5hours)

# **COMPUTER SKILLS**

- Cyber Security: Phishing Prevention (.25 min.)
- Information Security and Data Protection (.25 min.)
- Information Security Essentials (.25 min.)

- MS Office (PowerPoint, Word, Excel, Access for basic, intermediate, and advanced levels) (1 hr.)
- What is Ransomware? (30 min.)
- Your First React App (30 min.)

# **CONTINUOUS IMPROVEMENT**

- Emotional Intelligence: What is Emotional Intelligence? (30 min.)
- Employee Engagement How to Motivate Employees to Give Their Best (30 min.)
- Franklin Covey Leadership Course (40 hours)
- Kaizen Explained (30 min.)
- Lean Six-Sigma (40 hours)
- Managing Projects Successfully Cutting Edge Communication Series (30 min.)
- Performance Management Fundamentals (30 min.)
- Project Management Methodologies (30 min.)
- Root Cause Analysis 5 Whys? (30 min.)
- Understanding Unical's End to End Process (40 hours)

# HAZARDOUS MATERIALS

- Hazmat Health Hazards (.33 hours)
- Hazmat Labeling (.5 hours)
- Hazmat MSDSs (.5 hours)
- Hazmat Physical Hazards (.5 hours)
- Hazmat Protective Measures (.33 hours)

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



**EXPANSION FUNDS** 

# **Retrainee-Job Creation**

# **Training Proposal for:**

# Valley Communications, Inc.

# Contract Number: ET22-0175

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: K. Mam

# PROJECT PROFILE

Contract	Priority Rate		Industry	Construct	ion (C)
Attributes:	Retrainee		Sector(s):		
	SB <100				
	Job Creation In	itiative			
	Veterans				
	Expansion Fund	ds (Alt/Gen)		Priority Industry: 🛛Yes 🔲No	
Counties Served:	Sacramento		Repeat Contractor:	🗌 Yes [	⊠ No
Union(s):	n(s): 🛛 Yes 🗌 No International B		rotherhood c	f Electrical	Workers Local 340
Number of	Employees in:	CA: 64	U.S.:64		Worldwide: 64
<u>Turnover R</u>	late:	7%			
Managers/ (% of total tra	<u>Supervisors</u> : inees)	N/A			

# FUNDING DETAIL

In-Kind Contribution \$144,177

Total ETP Funding	
\$92,460	

# TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range Hou		Average Cost per	Post- Retention
No.	bee Beechpilon	Type of fraining	Trainees	Class / Lab	СВТ	Trainee	Wage*
1	Retrainee Priority Rate SB <100	Business Skills, Commercial Skills, Computer Skills, Cont. Improv, HAZMAT, OSHA 10/30, PL-Commercial Sklls	54	8-200 Weighte 60	•	\$1,380	\$23.58
2	Retrainee Priority Rate Job Creation Initiative SB<100	Business Skills, Commercial Skills, Computer Skills, Cont. Improv, HAZMAT, OSHA 10/30, PL-Commercial Sklls	10	8-200 Weighte 60	•	\$1,380	\$20.00
3	Retrainee Priority Rate Veterans SB<100	Business Skills, Commercial Skills, Computer Skills, Cont. Improv, HAZMAT, OSHA 10/30, PL-Commercial Sklls	3	8-200 Weighte 60	•	\$1,380	\$26.08

\*Post-Retention Wage is the Contractual Wage.

 Minimum Wage by County:
 Job Number 1 (Retrainee):
 \$19.12 per hour for Sacramento

 County;
 Job Number 2 (Job Creation):
 \$15.65 per hour for Sacramento County.

 Job Number 3 (Veterans):
 \$19.12 per hour for Sacramento County

 Health Benefits:
 Yes
 No

 This is employer share of cost for healthcare premiums –

 medical, dental, vision.

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

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

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1 (Retrainee)						
Administrative Staff		5				
Estimator		3				
Operations		5				
Technician		6				
		33				
Project Manager		2				
Job Number 2 (Job Creation)						
Administrative Staff		1				
Estimator		1				

Operations	1
Technician	2
rechnician	3
Project Manager	2
Job Number 3 (Veterans)	
Operations	1
Technician	2

# **INTRODUCTION**

Founded in 1983 and headquartered in Sacramento, Valley Communications, Inc. (VCI) (<u>www.valley-com.com</u>) provides design and installation services for integrated technology including voice and IT networks, building systems, security systems, and Closed-Circuit Television (CCTV) systems to general contractors, school systems, and building owners. Training will take place at their location in Sacramento. This is VCI's first ETP project.

#### Veterans Program

VCI plans to train three Veterans (Job Number 3) who have served on active full-time duty in the Armed Forces.

#### Union Support

Technicians are represented by International Brotherhood of Electrical Workers, Local 340. The union has submitted a letter of support for this training project.

# PROJECT DETAILS

Due to ongoing changes in technology, VCI has established a training plan focused on upgrading the skills of its workforce. Each job is unique and staff must train on each manufacturer's equipment. In addition, continuous new developments in high-end audio-visual, security systems and artificial intelligence technologies require staff to receive ongoing training. Training will focus on sophisticated equipment operation, safety certifications, and security protocols. Training under this proposal will allow the Company to remain competitive while training in increasingly advanced systems.

#### **Retrainee - Job Creation**

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

VCI is experiencing an increase in demand in audio-visual, security systems and telecommunication services. To meet demands, the Company will hire 10 new employees (Job Number 2) including Administrative Staff, Estimator, Operations, Technician, and Project Manager. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

# Training Plan

Training will be delivered via Class/Lab, E-Learning, Videoconferencing, Computer-Based Training (CBT) and Productive Lab (PL) methods. Training will be delivered by in-house experts and vendors as needed in the following:

**Business Skills**: Training will be offered to all occupations. Training will focus on customer service. Training topics include Customer Service, Cost Control, and Project Requirements Analysis and Specifications.

**Commercial Skills**: Training will be offered to Estimator, Operations, Technician, and Project Manager. Training will focus on equipment operation. Training topics include Telecommunication Equipment, Security Equipment, and Audio Visual.

**Computer Skills**: Training will be offered to all occupations. Training will focus on the Company's internal software. Training topics include Bluebeam, CAD Software, and Security Software.

**Continuous Improvement**: Training will be offered to all occupations. Training will focus on project management. Training topics include Project Management and Leadership.

**Hazardous Materials**: Training will be offered to Operations and Technician. Training will focus on materials handling. Training topics include Hazardous Materials Handling and Hazardous Waste Cleaning.

# Certified Safety Training

<u>OSHA 10/30.</u> 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.

# Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0-30 hours of CBT.

# Productive Laboratory (PL)

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

Training in Commercial Skills will be delivered to all Technicians. Trainees will learn how to install highly technical audio-visual equipment and programmable lighting equipment and construct electrical systems in CAD software programs. Trainees will work with a trainer who will demonstrate step-by-step instructions. Afterwards, the trainer will observe trainees performing the tasks. Production will be negatively impacted during training as trainees are learning. VCI is requesting a 1:5 trainer-to-trainee ratio and up to 100 PL training hours due to the complexity of each system and each crew consists of five Technicians and one Project Manager. This will allow the Company to provide the hands on training necessary to remain safe and productive.

# Commitment to Training

ETP funds will not displace the existing financial commitment to training. VCI has an annual training budget of \$40,000. Training includes mandatory company-wide trainings. Safety training

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

Training Infrastructure

The Operations Manager and Administration Team will be responsible for overseeing all aspects of the training project including tracking training hours and scheduling training. Additionally, the Company has retained a third-party administrator with extensive ETP administration experience to work closely with staff to complete the project successfully.

#### **DEVELOPMENT SERVICES**

Carrazco Tax Solutions in Sacramento assisted with development of this proposal for a flat fee of \$9,200.

# ADMINISTRATIVE SERVICES

Carrazco Tax Solutions also 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/E-Learning/Videoconferencing Hours

8-200 Trainees may receive any of the following:

# **BUSINESS SKILLS**

- Customer Service
- Cost Control
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications

#### **COMMERCIAL SKILLS**

- Audio Visual
- Blue Print Reading
- Building Systems
- Confined Space
- Construction Contract Administration
- Construction Cost Awareness and Production
- Construction Management
- **4** Equipment Operation
- Estimating
- Forklift/Scissor Lift
- How to Complete a Work Authorization
- Personal Protection Equipment
- Product Knowledge
- Project Management
- Security Equipment
- Telecommunication Equipment

# COMPUTER SKILLS

- Advanced Excel
- 4 Audio Visual Software
- \rm 🕹 Bluebeam
- CAD Software
- Microsoft (Intermediate and Advanced)
- Plangrid
- Security Software
- 🔸 VM Ware
- Website Maintenance

# **CONTINUOUS IMPROVEMENT**

- Cross Training
- \rm Leadership
- Project Management
- Supervisor Skills

# HAZARDOUS MATERIALS

- Asbestos Removal
- Hazardous Materials Handling
- Hazardous Chemical Cleaning/Handling
- Hazardous Waste Cleaning

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

 OSHA 30

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

# Productive Lab Hours

0-100

#### **COMMERICAL SKILLS** (1:5 trainer-to-trainee ratio)

- Audio Visual
- Building Systems
- Equipment Operation
- Forklift/Scissor Lift
- How to Complete a Work Authorization
- Security Equipment
- Telecommunication Equipment

# CBT Hours

0-30

#### <u>OSHA 10</u>

- Caught In or Between (0.5 hr)
- Cranes, Derricks, Hoists, Elevators & Conveyors (0.5 hr)
- Electrocution (1 hr)
- Excavations (0.5 hr)
- Falls (1.5 hrs)
- Health Hazards in Construction (0.5 hr)
- Introduction to OSHA (1 hr)
- ↓ Materials Handling, Storage, Use and Disposal (0.5 hr)
- Personal Protective and Lifesaving Equipment (0.5 hr)
- Scaffolds (0.5 hr)
- Stairways and Ladders (0.5 hr)
- Struck-By (1 hr)
- ↓ Tools Hand and Power (0.5 hr)

# <u>OSHA 30</u>

- Asbestos Awareness (0.5 hr)
- Asbestos for Supervisors (2 hrs)
- Caught-in or Between (1.5 hrs)
- Confined Spaces (0.5 hr)
- Cranes, Derricks, Hoists, Elevators and Conveyors (0.5 hr)
- Electrical Safety (2 hrs)
- Ergonomics (0.5 hr)
- Excavations (0.5 hr)
- Fall Prevention (1.5 hrs)
- Fire Protection and Prevention (0.5 hr)
- Foundations for Safety Leadership (2.5 hrs)
- Hand and Power Tool Safety (1 hr)
- Hazard Communication (0.5 hr)
- Hazardous Materials (0.5 hr)
- Health Hazards in Construction (2 hrs)

- Introduction to OSHA (1 hr)
- Lead Awareness (0.5 hr)
- ↓ Lead Exposure (0.5 hr)
- Managing Safety and Health (2 hrs)
- Materials Handling, Use and Disposal (0.5 hr)
- ♣ Motor Vehicles (0.5 hr)
- Personal Protective Equipment (2 hrs)
- **4** Rollover Protective Structures, Signs, Signals and Barricades (0.5 hr)
- Safety and Health Programs (0.5 hr)
- Scaffolds (0.5 hr)
- Silica Exposure (0.5 hr)
- Stairways and Ladders (1 hr)
- ♣ Steel Erection (0.5 hr)
- 4 Struck-by (1 hr)
- Welding and Cutting (0.5 hr)

# **COMMERCIAL SKILLS**

Back Safety Basics & Update (0.5 hr)

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



September 21, 2021

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand that Valley Communications, Inc. is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: 35 Current Employees and potentially up to 10 new hires (over the next 2 years) in Senior Technicians, Technicians and Installers.

# <u>Exhibit E</u>

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely,

Robert D. Ward Electrical Workers Local Union No. 340



# **EXPANSION FUNDS**

# **Training Proposal for:**

# Ventura County Electrical Joint Apprenticeship and Training Trust Fund

# Contract Number: ET22-0917

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: M. Reeves

# PROJECT PROFILE

Contract	Expansion Funds (Alt/Gen)	Industry	MEC (H)		
Attributes:	Retrainee	Sector(s):	Construction (23)		
	Apprenticeship				
	Veterans				
	Priority Rate		Priority Industry: 🛛 Yes 🗌 No		
Counties	Ventura	Repeat	⊠ Yes □ No		
Served:	ventura	Contractor:			
Union(s):	Yes Do International Bro	rotherhood of Electrical Workers, Local 952			
Turnover R	ate:	≤20%			
Managers/S	Supervisors: (% of total trainees)	N/A			

# **FUNDING DETAIL**

Program Costs	+	Support Costs	=	Total ETP Funding
\$214,872		\$18,678 Job Numbers 1-2: 8% Job Number 3: 20%		\$233,550
In-Kind Contribution:	50% of	Total ETP Funding Required	I	Inherent

# TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Journeyworker	Business Skills, Commercial Skills, OSHA 10/30	11	8-200 Weighted 24	•	\$590	\$43.50
2	Retrainee Apprentice	Business Skills, Commercial Skills, OSHA 10/30	48	8-210 Weightee 200	0	\$3,850	\$21.75
3	Retrainee Apprentice Veterans st-Retention Wage is the	Business Skills, Commercial Skills, OSHA 10/30	10	8-210 Weightee 200	•	\$4,226	\$21.75

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Job Numbers 1-3: CBA wages will be used
Health Benefits: Xes 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	Post-Retention Wage Range	Estimated # of Trainees
Job Number 1		
Journeyworker Electrician/Inside Wireman		11
Job Number 2		
Apprentice Electrician/Inside Wireman		11
		37
Job Number 3		
Veteran Apprentice Electrician/Inside Wireman		3
		7

# INTRODUCTION

Ventura County Electrical Joint Apprenticeship and Training Trust Fund (Ventura County Electrical or the Trust) (<u>www.vcjatc.org</u>) was founded in 1977, to provide up-to-date industry skills training and secure high-quality job opportunities for its members. Ventura County Electrical is governed by a Board of Trustees comprised of four labor and four management representatives and is a joint effort of the International Brotherhood of Electrical Workers Local 952 and the National Electrical Contractors Association. This will be the Trust's seventh ETP contract, and sixth within the last five years.

All trainees are members of IBEW Local 952, which currently represents over 486 electricians with over 100 participating employers. Ventura County Electrical trains inside wiremen who install the power, lighting, controls and other electrical equipment in commercial and industrial buildings. Ventura employers and their electricians play an important role in retrofitting buildings throughout

the county to ensure the use of up-to-date energy efficient technologies and materials. This project will help Ventura County's electrical companies meet local and state energy efficiency goals.

#### Veterans Program

Ventura County Electrical recruits Veterans in cooperation with Helmets to Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. On its website, the Trust advertises special days dedicated for Veterans to apply for the apprenticeship program. The Trust is committed to supporting job-related training that helps Veterans transition into the California workforce and has included a Veterans component in this project (Job Number 3) to support this effort.

#### Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is five years. The curriculum is developed with input from DAS and a designated Local Educational Agency, in this case Ventura County Office of Education.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$23 to \$18 per class/lab hour.

# PROJECT DETAILS

Inside Wiremen install and maintain the various types of electrical systems found in commercial and industrial facilities, electric vehicle stations, and transit systems. They also install conduit systems that contain the wire from the motor control centers or panel boards to the equipment that uses electricity. Electricians are trained to use the latest energy efficient technologies and materials to ensure buildings meet CA building requirements. Ventura County Electrical also runs the Electric Vehicle Infrastructure Training Program. This program has helped to develop a workforce of electricians to meet the increasing demand for electric vehicle charging stations in Ventura County.

Participating employers have identified the following additional reasons for training: new energy efficiency regulations, out-of-state competition, the need to reduce costs, higher quality standards, retiring workforce, and increasing complexity of construction projects. Construction projects trainees will be working include: Amazon Distribution Center in Oxnard, HVAC system upgrades at multiple facilities in the Oxnard Union High School District, Atara Biotherapeutics tenant improvement project in Newbury Park, a cold storage facility in Oxnard, and ongoing projects at Port Hueneme Harbor.

# Training Plan

Training will be provided via Class/Lab and E-Learning in the following:

**Business Skills**: Business Skills courses will be offered to all occupations. Apprentices and Journeyworkers will be trained in project planning and scheduling, new national building codes and green practices, project development practices, project estimating, and collaborative bidding. Training will also include team building and leadership skills to ensure trainees can lead teams in an effective and efficient manner.

**Commercial Skills:** Commercial Skills courses will be offered to all occupations. Training will include energy-efficient technologies and products such as green building materials, solar photovoltaic panels, wiring methods and materials, new motor controls, fiber optics, electrical testing instruments, and security systems.

#### Certified Safety Training

<u>OSHA 10/30:</u> This training is a series of courses "bundled" by industry sector and occupation. The coursework is geared to construction work and manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

#### Marketing and Support Costs

Class information is disseminated to apprentices, journey-level electricians, and electrical contractors through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and the Ventura County Electrical website. Application announcements for the program are circulated to local, state and federal agencies; high schools and community colleges; and community-based organizations.

Ventura County Electrical requests and staff recommends 8% support costs for Job Numbers 1 and 2, and 20% support costs in Job Number 3 (Veterans).

#### Commitment to Training

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

Training Infrastructure

The Training Director of Ventura County Electrical will oversee this project. The Trust has 13 part-time trainers and one full-time trainer. The trainers are former or current members of the trade and have received or are scheduled to receive Master Certification status by the Electrical Training Alliance. Ventura County Electrical has also retained a third-party administrator to assist with ETP project administration.

#### Impact/Outcome

Certifications earned by Journeyworkers and Apprentices may include: OSHA 10/30, Rigging & Lifting, Green Audits, Arc Flash Safety Awareness, Building Automation Systems, California Advanced Lighting Controls Program, Lighting Control & Acceptance Testing, Title 24 Lighting Installation & Codes, and Energy Storage & Microgrid Training & Certification.

### Tuition Reimbursement

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

## ACTIVE PROJECTS

The following table summarizes performance by Ventura County Electrical under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0928	\$128,410	09/01/2020 – 08/31/2022	76	56	TBD

Based on ETP Systems, 5,238 reimbursable hours have been tracked for potential earnings of \$102,738 (80% of approved amount). The Contractor projects final earnings of 100% based on training delivered to date and in progress through contract closeout.

### PRIOR PROJECTS

The following table summarizes performances by Ventura County Electrical under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%	
*ET20-0908	Oxnard	09/03/2019– 09/02/2021	\$252,800	TBD	
ET19-0912	Oxnard	07/30/2018– 07/29/2020	\$325,330	\$325,330 (100%)	
ET17-0929	Oxnard	01/27/2017– 01/26/2019	\$195,000	\$195,000 (100%)	
ET16-0911	Oxnard	10/05/2015– 10/04/2017	\$222,800	\$220,024 (99%)	

\*ET20-0908: Based on ETP systems, 114 trainees completed the minimum required hours for reimbursement (105% of the 108 planned number to retain). ETP systems show that 13,830 have been tracked for potential earnings of \$270,248 (107% of approved amount). To date, 48 trainees have been retained for approved earnings of \$184,800 (73%). The Contractor projects final earnings of 100%, pending final closeout of this Contract.

## DEVELOPMENT SERVICES

California Labor Federation in Oakland and Strategy Workplace Communications in Alameda assisted with development at no cost.

## ADMINISTRATIVE SERVICES

Strategy Workplace Communications will also perform administrative services for a fee not to exceed 13% of payment earned.

## TRAINING VENDORS

N/A

### Exhibit B: Menu Curriculum

### Class/Lab/E-Learning Hours

8 – 200 hours (Job Number 1)

### Trainees may receive any of the following: Journeyworker Training

### **COMMERCIAL SKILLS**

- AC Theory
- Blueprint Reading and Specifications
- Building Automation Systems
- California Advanced Lighting Controls Program (CALCTP)
- Conduit Bending & Raceway Installations
- Confined Space Entrant & Attendant
- CPR/First-Aid/AED
- Cyber-Security Systems
- DC Theory
- Electric Vehicle Infrastructure Training Program (EVITP)
- Electrical Project Supervision
- Electrical Safe Work Practices based on the NFPA70E
- Electrical Test Instruments
- Energy Storage & Microgrid Training (ESAMTAC)
- Fiber Optics
- Fire Alarm Systems
- Forklift and Aerial Lift Safety
- Grounding and Bonding
- Hand Tools and Power Tools
- Hazardous Locations
- Jobsite Safety
- Lockout-Tagout Methods
- Low Voltage Structured Wiring Systems
- Mathematics for Electrical Workers
- Motors & Motor Control Systems
- National Electrical Code Calculations
- National Electrical Codeology
- Orientation to Organization and Structures
- Overcurrent Protection
- Photovoltaic Systems
- Process Instrumentation
- Programmable Logic Controllers (PLC's)
- Rigging and Lifting Fundamentals
- Security Systems
- Torque Fundamentals
- Transformers
- Wiring Methods and Materials

### **BUSINESS SKILLS**

- Project Estimating
- Project Planning and Scheduling

- Completing Work Reports
- Team Building Skills
- AutoCAD

### **OSHA (OSHA Certified Instructor)**

- OSHA 10
- OSHA 30

### Class/Lab/E-Learning Hours

8 – 210 Hours (Job Numbers 2 & 3)

### Trainees may receive any of the following: Apprentice Training

### **COMMERCIAL SKILLS**

- AC Theory
- Blueprint Reading and Specifications
- Building Automation Systems
- California Advanced Lighting Controls Program (CALCTP)
- Conduit Bending & Raceway Installations
- Confined Space Entrant & Attendant
- CPR/First-Aid/AED
- Cyber-Security Systems
- DC Theory
- Electric Vehicle Infrastructure Training Program (EVITP)
- Electrical Project Supervision
- Electrical Safe Work Practices based on the NFPA70E
- Electrical Test Instruments
- Energy Storage & Microgrid Training (ESAMTAC)
- Fiber Optics
- Fire Alarm Systems
- Forklift and Aerial Lift Safety
- Grounding and Bonding
- Hand Tools and Power Tools
- Hazardous Locations
- Jobsite Safety
- Lockout-Tagout Methods
- Low Voltage Structured Wiring Systems
- Mathematics for Electrical Workers
- Motors & Motor Control Systems
- National Electrical Code Calculations
- National Electrical Codeology
- Orientation to Organization and Structures
- Overcurrent Protection
- Photovoltaic Systems
- Process Instrumentation
- Programmable Logic Controllers (PLC's)
- Rigging and Lifting Fundamentals
- Security Systems

- Torque Fundamentals
- Transformers
- Wiring Methods and Materials

### **BUSINESS SKILLS**

- Project Estimating
- Project Planning and Scheduling
- Completing Work Reports
- Team Building Skills
- AutoCAD

## **OSHA (OSHA Certified Instructor)**

- OSHA 10
- OSHA 30

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

Note: Reimbursement for Journeyworker retraining is capped at 200 total training hours per trainee in Job Number 1 and Apprentice training is capped at 210 total training hours per trainee in Job Numbers 2 and 3, regardless of the method of delivery.



## **EXPANSION FUNDS**

## **Retrainee-Job Creation**

## **Training Proposal for:**

# Vision Care Center, A Medical Group, Inc.

## Contract Number: ET22-0166

Panel Meeting of: November 19, 2021

ETP Regional Office: Sacramento

Analyst: J. Fetsch

## PROJECT PROFILE

Contract	T nonly rate		Industry Sector(s):	Services	. ,
Allindules.	Expansion Funds (Alt/Gen) Job Creation Initiative			Healthca	re (62)
	Retrainee Medical Skills Training			Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	Fresho		Repeat Contractor:	⊠Yes □No	
Union(s):	Union(s): 🗌 Yes 🖾 No				
Number of Employees in:		CA: 226	U.S.: 226		Worldwide: 226
<u>Turnover Rate</u> :		15%			
<u>Managers/Supervisors</u> : (% of total trainees)		0%			

## **FUNDING DETAIL**

In-Kind Contribution \$212,500

Total ETP Funding
\$175,628

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of	Rango Hou Class /	rs	Average Cost per	Retention
110.			Trainees	Lab	CBT	Trainee	Wage*
1	Retrainee	Business Skills, Comm'l. Skills,	223	8-200	0-6	\$736	\$19.12
	Priority Rate Medical Skills Training	Computer Skills, Cont. Imp., Mgmnt. Skills, HazMat, MS-Didactic		Weighte 32	•		
2	Retrainee Job Creation Initiative Priority Rate Medical Skills Training	Business Skills, Comm'I. Skills, Computer Skills, Cont. Imp., Mgmnt. Skills, HazMat, MS-Didactic	10	8-200 Weighte 50	•	\$1,150	\$15.65

\*Post-Retention Wage is the Contractual wage

Minimum Wage by County: Job Number 1: \$19.12 per hour in Fresno County

Job Number 2 (Job Creation): \$15.65 per hour in Fresno County

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1						
Administration		4				
		2				
		1				
Accounting		2				
Business Officer		12				
		4				
		3				
Coordinator		8				
Clinical Staff		35				
		35				
		18				
Front Desk		6				
		3				

Information Tech	4
Maintenance	2
	2
Front Line Manager	10
Optical Staff	17
	8
	2
Scheduling	10
	5
Administrative Staff (Surgery Center)	13
	6
	3
Surgery Support	1
	4
	3
Job Number 2	
Administration	2
Clinical Staff	6
Optical Staff	2

## INTRODUCTION

Founded in 1956 and headquartered in Fresno, Vision Care Center, A Medical Group, Inc. (Vision Care) (<u>www.eyeqvc.com</u>), is a leading comprehensive eye care provider. The Company services include general eye exams to complex eye surgeries including Lasik, cataract treatments, optical services, retina treatments, glaucoma testing and treatment, pediatric eye care and dry eye treatment. Vision Care has three locations in the Central Valley and service all aspects of eye and vision care. Training will be conducted at the Fresno, Clovis and Selma locations. This is Vision Care's third ETP Contract, and third in the last five years.

### Veterans Program

Vision Care actively recruits Veterans and participates in Veteran job fairs to recruit for all open occupations. However, there is not a Veterans component in this project.

### PROJECT DETAILS

Prior training focused on the Company's Electronic Health Records System update. As well as, efficiencies and quality control standards and new or updated eye treatments and prevention. This project will focus on implementing a new training system, HealthStream, which is a system designed to help healthcare organizations conduct regulatory compliance training for its staff members. This new system will allow the Company to offer updated training for all occupations to provide the best service possible and give trainees skills needed for upward mobility in the healthcare industry.

The Company has experienced steady growth of around 10% over the last year and is making it a priority to meet new patient demands. As a result, Vision Care has developed an extensive amount of training to ensure that all competency benchmarks are met with internal staff and new employees in order to maintain consistency throughout the Company. To keep up with growth, Vision Care is implementing a training program for Front Line Managers to be able to grow with the company, focused on ensuring the organization reaches its full potential in not only quality of care but business process and change management.

#### **Retrainee - Job Creation**

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

Vision Care is expanding service capacity by adding two new doctors and appropriate staffing at its Fresno location to keep up with increasing demand for services provided. The Company will hire 10 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

### Training Plan

Training will be delivered via Class/Lab, E-Learning, Videoconference and Computer-Based Training (CBT) in the following:

**Business Skills**: Training will be offered to all occupations and focus on customer service and product knowledge. Topics include Effective Communication, World Class Customer Service Skills and Effective Sales and Marketing.

**Commercial Skills**: Training will be offered to all occupations and focus on properly maintaining the building and optical equipment. Training topics include Medical Grade Sanitation Skills.

**Computer Skills**: Training will be offered to all occupations and focus on implementation and version updates of software. Training topics include Telemedicine Platforms and NextGen Electronic Health.

**Continuous Improvement**: Training will be offered to all occupations and focus on building good teamwork qualities. Training topics include Team Building and Leadership Skills.

**Hazardous Materials**: Training will be offered to all occupations and focus on the recognition, reporting, and disposal of hazardous materials. Training topics include Medical Waste Disposal, Handling, Communications and Storage.

**Management Skills**: Training will be offered to the Front-Line Managers and focus on planning and effective leadership. Training topics include Medical Practice Management and Strategic Planning

**Medical Skills- Didactic**: Approximately 100 trainees including Clinical Staff will participate in clinical skills training, including didactic training. Classroom/laboratory training will be provided in by advanced clinical processes to ensure competency and maximize patient satisfaction and safety. Training topics include Blood Borne Pathogens, Advanced Cardiac Life Support, and Vision Surgery Practices.

### Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0-6 hours of CBT.

### Commitment to Training

Vision Care's annual training is approximately \$25,000 annually on training per facility and includes basic skills updates, new-hire classroom and preceptor-led training, safety training and mandated compliance training.

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

Training Infrastructure

The Controller, a Human Resources staff member, and a Manager will all oversee contract administration. Each location has one point of contact responsible for training schedules, administration, and to track trainings. Vision Care has also retained a third-party administrator who has extensive ETP experience to assist with administration. Training will be delivered by in-house experts and vendors as needed.

### ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0284	\$96,000	5/17/21- 5/16/23	48	33	7

Based on ETP Systems, 128 reimbursable hours have been tracked for potential earnings of \$64,000 (67% of approved amount). The Contractor projects final earnings of 100% based on training currently committed and in progress through March of 2023.

## PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0157	Fresno	8/6/18- 11/3/20	\$152,828	\$113,969 (75%)

### DEVELOPMENT SERVICES

Strategic Business Solutions, LLC in Visalia assisted with development for a flat fee of \$8,250.

### **ADMINISTRATIVE SERVICES**

Strategic Business Solutions, LLC will also perform administrative services for a fee not to exceed 10% of payment earned.

## TRAINING VENDORS

To Be Determined

ETP 130 - Single (Revised 10/8/2021)

### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning/Videoconference Hours

8-200 Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Effective Communication
- Effective Sales and Marketing
- Product Knowledge Training
- Remote Working Benefits and Challenges
- World Class Customer Service Skills

### **COMMERCIAL SKILLS**

- Basic Life Support
- Medical Grade Sanitation Skills

### **COMPUTER SKILLS**

- Drug Dispensary System
- MS Office Suite (Intermediate and Advanced)
- NextGen Electronic Health
- Telemedicine Platforms

### CONTINUOUS IMPROVEMENT

- Leadership Skills
- Team Building

### HAZARDOUS MATERIALS

• Medical Waste Disposal, Handling, Communications and Storage

### MEDICAL SKILLS-DIDACTIC

- Advanced Cardiac Life Support
- Blood Borne Pathogens
- Child Abuse
- Contact Tracing/Reporting
- Disinfecting and Sterilization
- Elder Abuse
- HIPPA Training
- Job Specific Skills Competencies
- Protocol Review
- Patient Assessment and Care
- Personal Protective Equipment
- Screening and Triage for High and Moderate Risk Patients
- Skills Checking
- Tele Medicine
- Vision Surgery Practices

### MANAGEMENT SKILLS (Managers Only)

- Human Quality Management
- Medical Practice Management
- Strategic Planning

### CBT Hours

0-6 Trainees may receive any of the following:

### CONTINUOUS IMPROVEMENT

- Advanced Directives (40 Mins)
- Back Safety (25 Mins)
- Combined Space (40 Mins)
- Customer Service (25 Mins)
- Developmentally Appropriate Care of Adult Patients (30 Mins)
- Developmentally Appropriate Care of Pediatric Patients (45 Mins)
- Electrical Safety (25 Mins)
- Emergency Preparedness (40 Mins)
- End of Life Care (40 Mins)
- Fire Safety (35 Mins)

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.



**EXPANSION FUNDS** 

# **Training Proposal for:**

# Schilling Paradise Corp.

# Contract Number: ET22-0152

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: L. Vuong

## PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Retrainee Priority Rate		Industry Sector(s):	Construc	tion (C)
				Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	San Diego		Repeat Contractor:	🗌 Yes 🛛 No	
Union(s): 🗌 Yes 🖾 No					
Number of Employees in:		CA: 265	U.S.: 265		Worldwide: 265
<u>Turnover Rate</u> :		7%			
	Managers/Supervisors: (% of total trainees)				

## FUNDING DETAIL

In-Kind Contribution	
\$345,000	

Total ETP Funding	
\$322,575	

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	
1	Retrainee Priority Rate	Business Skillk, Comm. Skills, Computer Skills, Continuous Impr. PL - Comm Skills	255	8-200 Weighte 55	•	\$1,265	\$19.12

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: \$19.12 per hour for San Diego County.
Health Benefits: Yes No This is employer share of cost for healthcare premiums –
medical, dental, vision.
Used to meet the Post-Retention Wage?: 🛛 Yes 🗌 No 📋 Maybe
Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation				
Occupation Titles	Actual Wage Range	Estimated # of Trainees		
		10		
Customer Service Staff		5		
		5		
		15		
Engineering Staff		10		
		10		
Estimating Staff		5		
		5		
		73		
General Laborer		10		
		5		
		20		
Equipment Operator		15		
		10		
Frontling Manager/Supervicer/Superintendent		5		
Frontline Manager/Supervisor/Superintendent		2		
Project Manager		15		
Project Manager		10		
Quality Captral Staff		10		
Quality Control Staff		5		

Sales Staff	5
Sales Stall	5

### **INTRODUCTION**

Founded in 2009 and headquartered in El Cajon, Schilling Paradise Corp. (Schilling) (<u>www.schillingcorp.com</u>) is a private independent company that provides superior general engineering services for both wet and dry underground utilities. Services include pipe for sewer, storm drain and water systems, electric, natural gas, cable, telephone and street lighting systems. Schilling operates as both Prime contractor and Subcontractor; and offers services for public works as well as private projects and manufactures concrete structures. The Company provides service for customers located in San Diego, Orange, Riverside, Imperial and San Bernardino Counties.

### Veterans Program

Although the Company does not have a separate Veteran Job Number, Schilling encourages and actively recruits Veteran applicants to join the Company.

### PROJECT DETAILS

This is Schilling's first ETP Contract. In this proposal, Schilling requests ETP funding to train 255 full-time employees at its El Cajon location. To remain competitive and support current and future business needs, Schilling must cross-train and develop the skill sets of its workforce in order to adapt to the new business environment resulting from COVID-19 pandemic. The Company also faces challenges related to technology advances and increases in customer demand. Schilling must constantly improve its technology and quality of service while keeping its employees safe and healthy. Personal safety and health of each employee of the organization is of primary importance. According to Schilling, this proposal shall not replace, compete with or duplicate in any way already existing approved apprenticeship programs.

Workers will receive in-depth training in all aspects of the business including internal systems, company products and services, sales, new product knowledge (underground infrastructure and natural gas pipelines), customer specifications, process improvements and new technological advances. ETP funding will assist Schilling to successfully upgrade worker skills, increase production efficiencies, meet industry standards, exceed customer expectations and effectively manage overall business growth. Workers will gain skills to optimize job performance, better serve customers and improve efficiencies. Training is essential to the Company's business operations and success. Training will take place at the El Cajon facility and customers' sites in California. Training will be provided by in-house subject matter experts, and outside vendors if needed.

Training will be provided via Classroom/Laboratory, Videoconference, E-Learning and Productive Laboratory in the following:

**Business Skills**: This training will be offered to all occupations. Training will focus on communication, project bids, customer specifications, estimates, product knowledge and project management. Trainees will learn to provide improved and consistent customer service throughout all business activities.

**Commercial Skills**: This training will be offered to Engineering Staff, General Laborers, Equipment Operators, Project Managers and Quality Control Staff. Trainees will learn the Company's products and services to better serve customers, which include inspection, raw

materials, compliance tracking, equipment operation and maintenance, standards for excellence and utility structures. This will result in reduced costs and increased productivity.

**Computer Skills**: This training will be offered to all occupations. Training will assist workers develop proper tools to reduce costs and errors, identify work orders, time management of projects and become more proficient in the use of the Company's various software applications necessary to provide technical support.

**Continuous Improvement**: This training will be offered to all occupations to promote and improve operating processes, reduce costs and maximize efficiency to better serve customers.

**Productive Laboratory (PL) – Commercial Skills**: This training will be offered to General Laborers, Equipment Operators and Quality Control Staff.

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

Certain production skills are best learned through direct observation and hands-on experience. PL training will allow for practical, hands-on instruction that cannot be adequately duplicated in a classroom setting. Since equipment cannot be reproduced in a classroom setting, PL-Commercial Skills training is necessary to ensure safety standards are met. This training will be provided at a much slower pace than regular production with significantly higher defects as trainees gain proficiency. PL training will be provided to approximately 100 General Laborers, Equipment Operators and Quality Control Staff. PL training will take place at El Cajon and various customers' facilities in California.

Equipment to be used during the proposed PL training includes excavators, graders, cable, gas and water detectors and trenching equipment. A subject matter expert will conduct training with demonstrated knowledge and expertise in the construction industry. A department supervisor will certify trainee competency once training is completed. Training will be under constant supervision.

Schilling's training consists of highly technical subject matter that is generally delivered in small group settings to ensure consistency and optimal skills transfer. This small group setting (typically 1:3) allows the trainer to address critical questions while also achieving valuable knowledge sharing among trainees. Therefore, Schilling is requesting a PL trainer-to-trainee ratio of 1:3 and training will be capped at 60 hours per trainee.

### Commitment to Training

Schilling has a current annual training budget of approximately \$335,000 for its El Cajon facility. The Company's training consists of basic job skills training, new employee orientation, OSHAmandated safety training, on-the-job training program for manufacturing skills and basic computer and commercial skills. Most training is delivered via class/lab, on-the-job and E-Learning.

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. After the completion of ETP-funded training, the Company will continue to deliver training to keep pace with business climate and goals, technology upgrades, and continuous improvement efforts.

### Training Infrastructure

Training will begin upon Panel approval. Schilling has designed a team that includes a Corporate Controller, a Training Coordinator and ten Managers/Supervisors to oversee ETP training and

administrative responsibilities. Additionally, the Company has 30 in-house trainers who will assist with training documentation. The Company has also retained a third party vendor with ETP experience to ensure that all training records adhere to ETP requirements.

### DEVELOPMENT SERVICES

Schilling retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of \$15,000.

### ADMINISTRATIVE SERVICES

National Training Company, Inc. will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

### TRAINING VENDORS

To Be Determined

### Exhibit B: Menu Curriculum

### Class/Lab, Videoconference & E-Learning Hours

8-200

Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Communication Skills
- Conflict Resolution
- Creating Project Bids
- Customer Specifications
- Dry Utility Estimates
- Product Knowledge
- Product Specifications
- Project Management
- Wet Utility Estimates

### **COMMERCIAL SKILLS**

- Compliance Tracking
- Conduit Specifications
- Construction Services
- Covid-19 Procedures
- Crossing Procedures
- Equipment Cross-Training
- Equipment Maintenance
- Equipment Operation
- Equipment Set-Up and Testing
- Flatwork Procedures
- Forklift Operation and Safety
- Hand Holes
- Infrastructure Inspection Procedures
- Inspection Equipment
- Inventory & Raw Materials
- Mainline Procedures
- Management and Monitoring of Materials
- Planning & Due Diligence
- Points of Connection
- Quality Control
- Standard Operating Procedures
- Standards for Excellence
- Trenching Procedures
- Utility Structures

## **COMPUTER SKILLS**

- Document Control
- Electronic Bids
- Internal Applications
- Inventory Management Software
- Job Tracking System
- Microsoft Office (Intermediate and Advanced)

- Project Management Software
- Scheduling & Planning Jobs
- Web-Based Computer Applications

### CONTINUOUS IMPROVEMENT

- Decision Making Skills
- Job Site Quality Control
- Leadership Skills
- On-Site Organization
- Productivity Improvement Techniques
- Project Management
- Reducing Waste
- Team Problem Solving

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

### Productive Lab Hours

0-60

### **COMMERCIAL SKILLS (1:3)**

- Equipment Operation Procedures
- Inspection Procedures
- Maintenance Equipment Procedures
- Standard Operating Procedures
- Underground Construction Procedures

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



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

# **Training Proposal for:**

# Amcor Rigid Packaging USA, LLC

# Contract Number: ET22-0143

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: S. Phillips

## PROJECT PROFILE

Contract Attributes:	Priority Rate Job Creation Initiative Expansion Funds (Alt/Gen)		Industry Sector(s):	Manufac	turing (E)
				Priority Ir	ndustry: 🛛 Yes 🔲 No
Counties Served:	Butte & Solano		Repeat Contractor:	☐ Yes ⊠ No	
Union(s):	Union(s): 🗌 Yes 🖂 No				
Number of Employees in:		CA: 450	U.S.: 40,00	0	Worldwide: 48,000
<u>Turnover Rate</u> :		6%			
Managers/Supervisors: 6		6%			

## **FUNDING DETAIL**

In-Kind Contribution	
\$511,875	

Total ETP Funding
\$477,135

## TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per	Post- Retention
No.				Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Continuous	325	8-200	0	\$1,426	\$19.12
	Priority Rate	Improvement Manufacturing Skills OSHA 10/30 HAZMAT		Weighted Avg: 62			
2	Retrainee	Continuous	7	8-200	0	\$1,955	\$15.65
	Job Creation Priority Rate	Improvement Manufacturing Skills OSHA 10/30 HAZMAT		Weighted Avg: 85			

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County:Job Number 1 – Butte & Solano County - \$19.12 / hr.; Job Number2 – Butte & Solano County - \$15.65 / hr.(Job Creation)Health Benefits:☐ Yes ⊠ NoThis 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	Actual Wage Range	Estimated # of Trainees			
Job Number 1					
Accounting		1			
Coordinator		7			
Leader		14			
		8			
		13			
Maintenance		34			
		7			
Maintananaa Enginaar		1			
Maintenance Engineer		1			
		7			
Managara		6			
Managers		4			
		1			

	2
Operator 1	88
Operator 2	75
Quality Control	6
Specialists	33
Supervisors	9
Warehouse	8
Job Number 2	
Maintenance	3
Operator 2	3
Quality Control	1

### INTRODUCTION

Founded in 1979 and headquartered in Arbor, Michigan, Amcor Rigid Packaging USA, LLC (Amcor), specializes in developing and producing packaging for a variety of industries that include food, beverage, pharmaceutical, medical, home, and personal care. The Company's direct customers include, Gatorade, Pepsi, Baxter, Merck, Monster, Coke, Paul Mitchell, and Colgate Pharmaceutical. This will be Amcor's first ETP project.

### Veterans Program

While the Company is committed to hiring Veterans over a two year period, it does not wish to include a separate Veteran Job number. Veterans will receive the same training as Retrainees and will receive opportunities for growth within the Company.

### PROJECT DETAILS

The Covid-19 Pandemic has highlighted the need for worker safety whilst maintaining skills required to meet consumer demand. As such, Amcor is implementing Good Manufacturing Processes (GMPs) as well as new safety and sanitation procedures. This will ensure that workers remain safe while keeping up with demand.

The Company is also implementing a new cross training program which will include training on processes (GMPs), equipment and production across all departments necessary to ensure that staff have access to the skills necessary to meet company demands and promote within the Company. To that end, an internal workgroup has been established to assess situations to develop protocols and processes, update business practices, monitor inventory and output, etc. This will ensure that staff receive the necessary training to meet customer demands whilst maintaining safety for employees.

### Training Plan

Training will take place at two sites located in Butte and Solano Counties. The purpose of this training project is to provide the training necessary to master the skills needed to meet customer demand whilst maintaining staff safety. Staff will receive cross training across all departments so as to better adapt to the ever changing circumstances as a result of COVID-19.

Training will be provided by in-house staff as well as outside trainers when necessary. Training will be conducted in a classroom environment inclusive of some distance training (training delivered via online medium) when appropriate. The proposed training plan will assist the Company in remaining safe as well as better meet its customers' unique needs when called on.

**Manufacturing Skills**: All occupations are expected to receive training in this category as it relates to their job function. Staff will be able to perform their job and to provide improved and consistent customer service and support through the use of the skills learned in this category.

**Continuous Improvement**: In a continued effort to provide the best quality and service to its customers, Amcor would like to provide its frontline workers with skills that will increase their performance in the areas of Leadership Skills, Quality Concepts, Process Improvement, Team Building, Problem Solving, Basic Comprehension Skills, Early Management, Focus Improvement, Material Improvement, Organizational Capability, Business Training for Skills, Communication Skills, Project Management, Systems, Applications and Products, Key Performance Indicators, Business Performance/ Skills Enhancement, Intrapersonal Skills, Environmental Sustainability, Customer Service Skills, Finance and Accounting, Lean Six Sigma, Project Management Systems, CAD Drawing, CAD/BIM Production Detail Drawing Package, Structural Calculations, and Read Interpret Drawings.

### Certified Safety Training

- <u>OSHA 10/30.</u> This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
- 2. <u>Hazardous Materials (HAZMAT)</u>. This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, all occupations will receive up to a minimum of 8 hours of training up to 24 hours of training if necessary. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors.

In addition to class/lab, Amcor also respectfully requests to use E-Learning as a delivery method for this project. Training to be delivered includes all skills mentioned above.

## Commitment to Training

ETP funds will not displace the existing financial commitment to training. The safety of frontline staff is, and will continue to be, a priority in accordance with all pertinent requirements under state and federal law in light of COVID-19. ETP Funding will allow Amcor to deliver necessary training on both safety and the new project management system in a safe manner to all of its employees.

### Training Infrastructure

Training will be delivered by Amcor in-house trainers and vendors retained as needed for certified safety training. The project will be managed by the Operations Manager, Human Resource

Manager and Department Supervisors. Staff will coordinate with each department to collect and manage rosters in a binder. In addition, Amcor has also retained an administrative Sub-Contractor to help with project administration.

### Impact/Outcome

ETP training will help Amcor provide staff with the training necessary to customize services to its clients when necessary. Further, through the proposed training, staff will acquire the skills necessary to promote within the Company through cross training.

### Record Keeping

Due to COVID-19, Amcor would like to request to use an approved alternative recordkeeping process. The modified recordkeeping practices reviewed will properly substantiate the delivery of training, placement and retention as required in the Contract, and the modified record keeping practices can be audited by ETP. The modified recordkeeping practices agreed to by ETP and Contractor will be incorporated into the Contract.

### **DEVELOPMENT SERVICES**

The Company retained Training Grants Intelligence in Georgia to assist with development of this proposal for a fee not to exceed \$9,500 of the Final ETP Application amount.

### ADMINISTRATIVE SERVICES

The Company retained Training Grants Intelligence in Georgia 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/ E-Learning

8-200

Trainees may receive any of the following:

## MANUFACTURING SKILLS

- Production Equipment Operation and Maintenance
- Blow Molding Equipment
- Packaging Equipment
- Lean Manufacturing
- Cross Training in Operations and Maintenance
- Autonomous Maintenance
- Operator Process/ Equipment
- Technician Processes
- Maintenance Processes
- Pneumatic Equipment Operation
- Good Manufacturing Practices
- Quality Controls
- Troubleshooting Equipment
- Tracklog Training
- Preventative Maintenance
- Crane Training
- Scissor Lift Training
- Machine Shop Equipment
- Trak Lok Equipment Line
- Press Brake Equipment
- Lath Line Equipment
- Slitter Line

### CONTINUOUS IMPROVEMENT SKILLS

- Leadership Skills
- Amcor Operations
- Quality Concepts
- Just in Time Processes
- Process Improvement
- Team Building
- Problem Solving
- Early Management
- Focus Improvement
- Material Improvement
- Organizational Capability
- Business Training for Skills
- Project Planning/Management
- Systems, Applications and Products
- Communication Skills
- Key Performance Indicators
- Business Performance/ Skills Enhancement
- Environmental Sustainability
- Best Practices
- Customer Service Skills
- Finance and Accounting

- Intrapersonal Skills Training
- Lean Six Sigma
- CAD Drawing
- CAD/BIM Production Detail Drawing Package
- Engineering
- Structural Calculations using Analyst Programs or Methods
- Read and Interpret Drawings

### <u>OSHA</u>

- OSHA 10
- OSHA 30

### <u>HAZMAT</u>

• Hazardous Materials (Transport)

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



## **EXPANSION FUNDS**

## **Retrainee-Job Creation**

# **Training Proposal for:**

# Kagome, Inc.

## Contract Number: ET22-0169

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: K. Hernandez

## PROJECT PROFILE

Contract Attributes:	Expansion Fund Priority Rate Retrainee Job Creation In	, , , ,	Industry Sector(s):	Manufact	uring (E)
	HUA			Priority In	ndustry: 🖂Yes 🗌No
Counties Served:	Merced Kern San Mateo		Repeat Contractor:	⊠Yes □ No	
Union(s):	Union(s): 🗌 Yes 🖂 No				
Number of Employees in:		CA: 255	U.S.: 420		Worldwide: 2,500
Turnover Rate:		10%			
Managers/Supervisors: (% of total trainees)		11%			

## **FUNDING DETAIL**

In-Kind Contribution	
\$272,190	

Total ETP Funding	
\$244,260	

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	
1	Retrainee Priority Rate HUA	Business Skills, Comm'l Skills, Cont. Imp., HazMat, Mgt. Skills, Mfg. Skils, PL-Mfg. Skills	185	8-200 Weighte 40	-	\$920	\$15.00
2	Retrainee Priority Rate HUA Job Creation Initiative	Business Skills, Comm'l Skills, Cont. Imp., HazMat, Mgt. Skills, Mfg. Skils, PL-Mfg. Skills	21	8-200 Weighte 60	•	\$1380	\$15.00
3	Retrainee Priority Rate	Business Skills, Comm'l Skills, Cont. Imp., HazMat, Mgt. Skills, Mfg. Skils, PL-Mfg. Skills	49	8-200 Weighte 40	•	\$920	\$19.12

\*Post-Retention Wage is the Contractual Wage.

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

Minimum Wage by County: Job Number 1 (HUA): \$15.00 per hour in Merced and Kern				
Counties; Job Number 2 (HUA): \$15.00 per hour in Merced and Kern Counties; Job Number 3:				
\$20.86/hr. in San Mateo, and \$19.12/hr. in San Benito				
Health Benefits: Xes No This is employer share of cost for healthcare premiums –				
medical, dental, vision.				

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage in Job Number 3.

Wage Range by Occupation				
Occupation Titles	Actual Wage Range	Estimated # of		
		Trainees		
Job Number 1 (HUA)				
		7		
Facilities & Maintenance Staff		4		
		5		
		3		
Finance Staff, Human Resources & Administration Staff		4		
		10		

	8
Logistics Staff	3
	1
	8
Operations Staff	1
	3
	77
Operators	4
	2
	11
Quality Assurance Staff	5
	3
R&D Staff	5
	2
Sales Staff	1
	3
Supervisors & Managers	15
Job Number 2 (HUA)	
Operators	15
R&D Staff	3
Facilities & Maintenance Staff	1
Quality Assurance Staff	1
Logistics Staff	1
Job Number 3	
	1
Finance Staff, Human Resources & Administration Staff	2
	3
Logistics Staff	3
Operations Staff	2
Quality Assurance Staff	1
	5
R&D Staff	15
	10
0-10+-#	1
Sales Staff	

## INTRODUCTION

Founded in 1899 and headquartered in Los Banos, Kagome, Inc. (Kagome) is a large manufacturer of natural vegetable and fruit sauces, salsas, spreads, and dessert icings used in restaurants and sold by major U.S. retailers. Kagome's customers include Panda Express, Subway, Dominos, Taco Bell, Kentucky Fried Chicken, Chili's, Applebees, Costco, Sam's Club, and various grocery stores. Kagome has production, distribution and service locations in Merced and San Mateo Counties. Both locations will participate in training under this proposal.

Kagome's affiliate company, United Genetics Seeds Co. (UGS), located in Hollister will also participate in this training project. UGS develops and sells various vegetable seed products specializing in processing tomato, melon, watermelon, squash, hot pepper, sweet pepper and cucumber. In addition, United Genetics has regional breeding and partnerships to develop products in onion, okra, artichoke, eggplant and sweet corn. This is Kagome's second ETP project, the second in the last five years.

### Veterans Program

Although this project does not include a Veterans component, the training population of Kagome may potentially include Veterans. The Company works with its local chamber of commerce, uses online recruiting sites, and offers an internal recruiting program to recruit Veterans for open positions.

### PROJECT DETAILS

Both Kagome and UGS developed strategies to increase production, quality assurance, and implement new processes that support efficiencies of their operations. The companies have capital investments planned for a new production line, new packaging equipment, equipment automation, and facility upgrades & retrofits at a cost of approximately \$4,665,000. These capital investments will help Kagome and UGS improve efficiency and productivity, maintain Good Manufacturing Practices (GMP) standards, and stay competitive against national competition. Each investment in new equipment will require all staff to receive training to properly operate and maintain the equipment. Manufacturing Skills training for the Operators will be the primary focus of this training project with a goal of increasing production volume to meet the increase in customer orders scheduled for 2021-22.

In addition, the companies are implementing a leadership development program to develop frontline Supervisors and Managers. Likewise, the companies have a significant amount of training focused on integrating Covid-19 prevention, response and recovery practices. For this, the Companies have created internal training programs to standardize operating procedures. Furthermore, Kagome is implementing a new project management focus for all departments and positions at the Company to improve project timelines and workflow efficiency to better meet production performance goals.

### **Retrainee - Job Creation**

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

The Company will hire 21 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

Kagome and its affiliate company (United Genetics) are both planning on upgrading facilities, increasing automated machinery, introducing new products, and based on these investments at the Company they plan to hire 21 new employees.

### Training Plan

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

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

**Commercial Skills:** Training will be offered to R&D Staff and Supervisors & Managers. Employees will receive training specific to product development.

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

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

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

### Certified Safety Training

<u>Hazardous Materials (HAZMAT)</u>. This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Operators, Operations Staff, Logistics Staff and Quality Assurance Staff will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not yet been determined.

### Productive Laboratory (PL)

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

PL training will allow employees to perform their duties efficiently while being able to take on additional duties of surrounding machines, providing vital cross-training opportunities. This training strategy has been proven to increase efficiencies by reducing downtime. Trainees will receive hands-on training that is specific to the operation and maintenance of new equipment. PL will supplement Class/Lab training.

Trainees will be under direct trainer supervision at all times. The trainer will impart knowledge, observe, verify comprehension, and submit appropriate training documentation. Kagome requests a PL trainer-to-trainee ratio of 1:3 as a small percentage of PL training is currently delivered in small teams of 3 on the production floor. This is the most efficient training method for staff in the field. Approximately 150 Operators and R&D Staff trainees will receive up to 60 PL hours in the

following equipment: automated packing equipment, new packaging equipment, and new production line.

### Computer-Based Training (CBT)

CBT will be provided to reinforce Class/Lab training provided in Continuous Improvement Skills as outlined in the Curriculum. Trainees will receive between 0-25 hours of CBT.

### High Unemployment Area

Trainees (Job Number 1 and Job Number 2) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. Kagome's locations in Merced and Kern are in an HUA.

### 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. Kagome is requesting the HUA wage modification for these trainees, from \$19.12 to \$15.00 per hour.

### **Temporary to Permanent Hiring**

Kagome will train 10 Logistics Staff and Operators (Job Number 2), under Panel guidelines for the Temporary-to-Permanent program with the intention on hiring them fulltime. No progress payments will be taken on temp-to-perm trainees until the trainee is hired fulltime and retained on the job for 90 days. The average time for converting temporary workers into full-time permanent employment is no more than 6 months. Trainees will not receive employer paid health benefits while temporary employees. However, the trainees will be eligible for employer paid health benefits upon conversion to full-time employee at Kagome.

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

### Commitment to Training

In 2020 Kagome invested approximately \$70,000 for training related to human resources focused, safety training, and training for manual operations. In addition, the Company offers each employee up to \$2,500 in tuition costs for college coursework. ETP training will help Kagome implement a new curriculum, related to new products, processes and rapid growth. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Vice President of Human Resources will oversee all aspects of the training project. The Training Coordinator will be responsible for reports and internal data collection for tracking purposes. There will be staff at each location to help coordinate training and an internal team of nine high-level subject-matter experts and ten Supervisors/Managers will deliver training. Kagome retained Economic Incentives Advisory Group to provide administrative support.

## Alternative Recordkeeping

Kagome will use an approved alternative recordkeeping for E-Learning/Videoconferencing training sessions. The Trainers will submit all training documents upon completion of each training session.

## PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
		6/18/2018		
ET18-0209	Los Banos	-	\$247,680	\$185,736 (75%)
		9/1/2020		

## DEVELOPMENT SERVICES

The Company retained Economic Incentives Advisory Group in Phoenix, AZ to assist with development of this proposal for a flat fee of \$12,500.

## ADMINISTRATIVE SERVICES

Economic Incentives Advisory Group will also perform administrative services for a fee not to exceed 11.5% of payment earned.

## TRAINING VENDORS

To Be Determined

## Exhibit B: Menu Curriculum

### Class/Lab/E-Learning Hours

0–200 Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Business Communication
- Business Continuity
- Customer Relations
- Data Analysis
- Project Management
- Sales
- Supervisory Skills

### **COMMERCIAL SKILLS**

- Consumer Innovation
- Product Development

### CONTINUOUS IMPROVEMENT SKILLS

- Covid-19 Procedures
- Best Practices
- Line Improvement
- Process Improvement
- Process Inspection
- Quality Assurance
- Root Cause

## HAZARDOUS MATERIALS

- Ammonia Training
- Flammable and Combustible Liquids Safety
- Hazard Analysis and Critical Control Points
- Hazardous Communication
- Hazardous Waste
- Liquefied Petroleum Gas (LPG)
- Sanitation & Chemical Handling

### MANAGEMENT SKILLS (management trainees only)

- Consumer Innovation
- Product Development
- Building Organizational Capacity
- Coaching Skills
- Leadership Development
- Reporting

### **MANUFACTURING SKILLS**

- Aerial Lift / Boom lift / Scissor Lift
- Automation Controls
- Basic Food Facility Defense
- Breeding Seeds
- Check weighing

- Clean in Place/Clean out of Place
- Compressed Air Use
- Conveyors
- Covid-19 Prevention and Safety
- Current Good Manufacturing Practices
- Electrical Safety
- Equipment Operation, Maintenance & Troubleshooting
- Effective Pest Control
- Food Allergens
- Food Safety Modernization Act
- Food Safety Standards
- Fork Lift
- Glass and Hard Plastic Handling procedure
- Good Laboratory Practices
- Hand Tools
- Ingredient Inventory Management
- Labeling Systems
- Machine Safeguarding
- Material Handling/Shipping
- Metal Detection & Monitoring
- Minor Ingredients Training
- Mixer Training
- Recordkeeping and Recording
- Safe Quality Foods
- Sanitation and Housekeeping
- Scaler Raw Materials Training
- Safety Data Sheets Training
- Welding/Cutting/Brazing

### Productive Lab Hours

0–60

## MANUFACTURING SKILLS (Ratio 1:3)

- Equipment Operation, Maintenance & Troubleshooting
- Fork Lift
- Packing and Packaging

CBT Hours 0–25

### CONTINUOUS IMPROVEMENT SKILLS

- Ammonia Accident Prevention 0.25
- Ammonia Awareness
- Asbestos Awareness
- Bacteria Basics
- Back to Work/Safety, Safety Habits after Time Away From Work 0.2

0.22

0.27 0.23

- Basic Food Facility Defense
   0.32
- Basic Food Facility Defense Distribution
   0.25
- Being a Successful Supervisor 0.32
- Cellphones in the Workplace: A Dangerous Distraction
   0.14
  - Cleaning and Sanitizing Procedures for Food Manufacturers 0.37

0.28

Combustible Dust

- Communicating Effectively in the Workplace 0.28
- Communication and Trust
- Confined Space for Affected Employees 0.22
- Confined Space for Attendants
   0.35
- Controlling Salmonella in Food Manufacturing 0.32
- Dangerous Microorganisms in Food Manufacturing 0.4
- Dealing With Drug and Alcohol Abuse for Managers and Supervisors 0.2

0.25

- Driver Food Safety Standard Operating Procedures 0.17
- Effective Pest Control Practices
   0.32
- Effective Record Keeping Practices 0.23
- Effective Teamwork: Teamwork and What Destroys It 0.12
- Effective Teamwork: How to Better the Team and Synergy 0.22

0.48

- Effective Teamwork: The Ideal Functional Team
   0.17
- Electrical Safety
- Electrical Safety for Everyone 0.21
- Ethical Situations to Consider 0.34
- EQ Toolbox: How to be More Self Aware .03
- EQ Toolbox: Becoming Socially Aware .04
- Emergency Preparedness and Response 0.23
- Environmental Monitoring Basics 0.37
- Food Safety for Selectors Overview 0.2
- Foodborne Illness and Employee Reporting 0.37
- Forklift Safety Lessons for the Safe Operator 0.15
- GHS Hazard Communication: Pictograms and Hazards 0.43
- GHS Hazard Communication: Pictograms and Hazards Refresher 0.18
- GHS Hazard Communication: Safety Data Sheets 0.42
- GHS Hazard Communication: Safety Data Sheets Refresher 0.18
- GHS Hazard Communication: Standard Labels 0.35
- GHS Hazard Communication: Standard Labels Refresher 0.2
- GLPs: Overview of Good Laboratory Practices 0.18
- GMPs for Maintenance Personnel 0.28
- GMPs: Effective Hand Washing Techniques 0.28
- GMPs: Personal Hygiene Distribution 0.22
- GMPs: Personal Hygiene Fluid Products 0.2
- GMPs: Promoting Personal Hygiene 0.27
- Good Housekeeping: Everyone's Responsibility 0.18

0.33

0.27

0.23

- Hand and Power Tools
- Hazardous Communication (pre-GHS) 0.35
- High Lift Truck Review
- Introduction to Clean in Place
   0.23
- Introduction to Food Allergens 0.28
- Introduction to Food Fraud
- Introduction to Food Safety Standards 0.3
- Introduction to FSMA (Food Safety Modernization Act) 0.22

0.48

- Introduction to Hazard Communication 0.25
- Introduction to Root Cause Analysis
   0.28
- Leading Change
- Leading Change: Changing From Peer to Boss 0.17

- Leaders Working With Leaders: Building Your Team .04
- Lean Manufacturing
- Lessons Learned from Hand Injuries 0.2
- Lift Truck Operator Overview 0.28
- Lift Truck Safety Awareness
   0.28
- Loading Food Safety Standard Operating Procedures Overview 0.23

0.27

0.37

0.22

0.03

0.28

- Lock Out Tag Out Procedures
   0.33
- Machine Guarding
   0.38
- Material Handling Distribution 0.28
- More High-Impact Lockout/Tagout 0.21
- Move it Safely: Avoiding Injury While Moving Materials 0.2
- Overview of Dangerous E.coli
- Overview of Hazard Analysis Critical Control Point (HACCP) 0.27
- Overview of HACCP for Supervisors 0.42
- Overview of Preventive Controls
   0.28
- Pallet Truck Review
- Powerful Listening Skills
- Preventing Food Contamination
   0.37
- Preventing Foodborne Illness
   0.27
- Proper Handling of Food Allergens 0.3
- Receiving Food Safety Standard Operating Procedures Overview 0.25
- Recognize Eye Strain
   0.01
- Safety Decision-Making: Overcoming Human Nature 0.19
- Solving Problems at Work 0.33
- Transportation
- Understanding Listeria and its Danger to Food 0.35
- Waste Management Procedures and Proper Disposal 0.22

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



## **EXPANSION FUNDS**

## **Retrainee-Job Creation**

## **Training Proposal for:**

# Kirkhill, Inc.

## Contract Number: ET22-0145

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: K. Hernandez

## PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Priority Rate		Industry Sector(s):	Manufact	turing (E)
	Retrainee Job Creation Initiative			Priority Ir	ndustry: 🛛Yes 🗌No
Counties Served:	Orange		Repeat Contractor:	🗌 Yes 🛛 No	
Union(s):	🗌 Yes 🛛 No				
Number of Employees in: C		CA: 550	U.S.:550		Worldwide: 18,000
Turnover Rate:31%		31%	See Project Details Section		tion
<u>Managers/Supervisors</u> : (% of total trainees)		4%			

## **FUNDING DETAIL**

In-Kind Contribution	
\$476,300	

Total ETP Funding	
\$468,050	

#### Kirkhill, Inc. TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	400	8-200 Weighter 37	•	\$851	\$19.12
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	150	8-200 Weighte 37	-	\$851	\$16.19

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1: \$19.12 per hour in Orange County;

Job Number 2: \$15.93 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?: Xes No Maybe

Up to \$2.48 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1						
Engineers		15				
		5				
<b>E 1 0 1 6</b>		25				
Financial Staff		15				
		10				
		20				
Maintenance Staff		10				
		5				
Managers/Supervisor/Directors		10				
		5				
		15				
Operations Staff		5				
		5				
		85				
Production Associates		35				
		20				

Manufacturing Technicians	20
	5
	5
	40
Warehouse Workers	25
	20
Job Number 2	2
	3
Engineers	2
	2
Financial Staff	2
	2
	2
Maintenance Staff	2
	1
Management (Original and Disconstructions	3
Managers/Supervisor/Directors	2
	5
Operations Staff	2
	1
	50
Production Associates	35
	26
	2
Support Technicians	2
	1
	2
Warehouse Workers	2
	1
L	

### INTRODUCTION

Founded in 2018 and located in the Brea, Kirkhill, Inc. (Kirkhill) is a global leader in the production of high-performance elastomer products. The Company's headquarters is situated on 19 acres and consists of approximately 365,000 square feet of manufacturing space. The Company has a vast array of manufacturing capabilities within its vertically integrated operation including proprietary custom mixing & compounding, injection molding, and fabricating of organic and inorganic elastomer based products. Aerospace original equipment manufacturers contract with Kirkhill for its innovative elastomer formulation, product design, prototyping and lean manufacturing capability at a competitive price point for a wide variety of applications, products and services.

Kirkhill's elastomer products can be found on commercial, military and business aircraft around the world as well as missiles, space launchers and satellites. The Company's primary product offerings include radar absorbing material (RAM), ablative materials, conductive elastomers, electro static discharge (ESD) material, and extruded & molded solid rubber products. The Company also manufactures aerodynamic seals for commercial and military airframes, duct and firewall seals for aircraft engines, aircraft door, hatch seals, inflatable seals for cockpit canopies, aircraft window seals, and aircraft conductive seals for electromagnetic interference survivable conditions. Kirkhill's products are sold worldwide to a customer base that includes Boeing, Airbus, Gulfstream, GE Aviation, Pratt, Rolls Royce and Lockheed Martin.

#### Veterans Program

Although this project does not include a Veterans component, the training population of Kirkhill may potentially include Veterans. The Company welcomes veteran applicants for open positions.

#### PROJECT DETAILS

Kirkhill and the entire aviation supply chain industry was hit hard by the COVID-19 pandemic. The pandemic led to a reduction in business and overall sales. However, the demand for Kirkhill's products has started to return and business volume is growing. As the demand continues to increase, the Company must increase training in order to ramp up production to previous levels. A significant amount of training for the existing workforce and training for new employees is necessary to increase manufacturing capacity for the Company to meet the increased demand for products and services. Manufacturing skills training for Production Associates and Manufacturing Technicians will be the primary focus of this training project with a goal of increasing production volume to meet the increase in customer orders scheduled for 2021-22.

#### Turnover Rate

The ETP program is designed to fund training for stable, secure jobs. Thus, the employer's turnover rate cannot exceed 20% annually for the facility where training is requested. But the Panel may accept a higher turnover with evidence training will significantly decrease the turnover, or the employer experienced a singular reduction in workforce, or industry data supports a higher turnover rate. The Panel may, or may not choose to, impose a "turnover penalty" when the company crosses this 20% threshold.

If the Panel chooses to impose a turnover penalty, failure to stay under a maximum rate will trigger forfeiture of 25% of the amount earned for each trainee. The maximum rate is typically 20%, as measured by turnover during the 12-month period preceding termination of the ETP Contract.

The Aviation industry was hit hard by the COVID-19 pandemic. Many planes were grounded with the steep decline in air travel resulting in a drastic decrease in business for Kirkhill. In response, Kirkhill had to lay off and/or furlough employees to remain in business. The involuntary turnover rate for Calendar year 2020 was 31%. This turnover rate is a drastic increase from Kirkhill's normal turnover rates. Prior to the pandemic the Company's turnover rates were 3% for 2017, 2% for 2018, and 2% for 2019. Kirkhill will be growing its workforce back to its pre-pandemic level by 2023 and projects the turnover rate to return to the low single digits.

Therefore, Staff is recommending a turnover rate waiver be applied and the Panel does not impose a "turnover penalty" for Kirkhill.

#### **Retrainee - Job Creation**

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

The Company will hire 60 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

Due to increased business and product demand in 2021 the Company has created 40 net new jobs and expects the workforce to increase to 650 employees by the end of 2022 and 800 by 2023.

#### Training Plan

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

**Business Skills**: Training will be provided to all occupations to increase customer satisfaction and sales. Training will focus on Business Processes & Performance, Conflict Management, Cost Effective Solutions, Inventory Control, Logistics, Problem Resolution and Product Knowledge.

**Computer Skills**: Training will be provided to all occupations to reduce errors, increase on-time deliveries, and reduced operating costs. Training will focus on Computer Security, Computerized Inventory, Internal Applications, Project Management Software and Web-Based Computer Applications.

**Continuous Improvement**: Training will be provided to all occupations to improve operating efficiency and reduce costs. Training will focus on Identifying and Eliminating Waste, Root Cause Analysis, Team Problem Solving, and Total Quality Management Tools.

**Manufacturing Skills**: Training will be provided to Maintenance Staff, Production Associates, and Manufacturing Technicians to increase production volume. Training will focus on Conductive Seals Cross-Functional Production Equipment Training, Elastomer Formulation, Equipment Operation, Fabrication Equipment, Manufacturing Operating Procedures, and Prototyping.

#### **Productive Laboratory**

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

Due to the nature of Kirkhill's business, many skills must be learned with hands-on experience. PL training will allow for practical, real world experience that cannot be duplicated in a classroom setting. Classroom instruction is an inadequate and ineffective learning method of training for Production Associates and Manufacturing Technicians because of the complex equipment to be trained on. In addition, the equipment is too large to be brought into a classroom and it is very expensive. PL training is required for Production Associates and Manufacturing Technicians to assure comprehensive training in Manufacturing Skills. Kirkhill is requesting an increase in the PL training cap to 100 hours.

Trainees will be under direct trainer supervision at all times. The trainer will impart knowledge, observe, verify comprehension, and submit appropriate training documentation. Kirkhill requests a PL trainer-to-trainee ratio of 1:3 as a small percentage of PL training is currently delivered in small teams of 1:3 on the production floor. This is the most efficient training method for staff in the field. Approximately 80 Production Associates and Manufacturing Technician trainees will receive between 40-100 PL hours (PL will not exceed 100 hours per trainee). Training will be delivered on the following types of equipment: calendering, milling, rotocuring, compression, injection molding, extrusion, autoclave curing and fabricating.

#### **Commitment to Training**

In 2020 Kirkhill invested approximately \$525,000 for training in basic new-hire orientation, antiharassment, diversity and required OSHA. In addition, it provides first aid/CPR/AED and other related training. ETP training will help Kirkhill implement manufacturing skills training related to new products, processes and rapid growth. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Human Resources Director will administer the project. The Company's Training Coordinator and Managers/Supervisors (15) will work with the NTC team to coordinate enrollment, update ETP systems, verify retention, and ensure compliance with all ETP requirements. An administrative subcontractor has been hired to assist with administration of the project.

#### **DEVELOPMENT SERVICES**

The Company retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of \$15,000.

#### ADMINISTRATIVE SERVICES

National Training Company, Inc. will also perform administrative services for a fee not to exceed 13% of payment earned.

#### TRAINING VENDORS

To Be Determined

## Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8 – 200 Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Business Processes & Performance
- Coaching and Mentoring Skills
- Conflict Management
- Cost Effective Solutions
- Effective Listening Skills
- Financial Skills
- Inventory Control
- Logistics
- Marketing Strategies
- Problem Resolution
- Product Knowledge

### **COMPUTER SKILLS**

- Computer Security
- Computerized Inventory
- Internal Applications
- Inventory Management Software
- Microsoft Applications (Intermediate /Advanced)
- Project Management Software
- Web-Based Computer Applications

#### CONTINUOUS IMPROVEMENT SKILLS

- Covid-19 Procedures
- Identifying and Eliminating Waste
- Lean Manufacturing Programs
- Productivity Improvement Techniques
- Root Cause Analysis
- Standard Work Instructions
- Team Problem Solving
- Total Quality Management Tools

#### **MANUFACTURING SKILLS**

- Aerodynamic Seals
- Aerospace Technical Requirements
- AS9100
- Compliance Tracking
- Conductive Seals
- Cross-Functional Production Equipment Training
- Elastomer Formulation
- Engineering Processes
- Equipment Maintenance
- Equipment Operation
- Equipment Safety Procedures
- Equipment Set-Up and Testing

- Extruded and Molded Production
- Fabrication Equipment
- Forklift Procedures
- Inspection Equipment
- Inventory & Raw Materials Training
- Job Instructions
- Manuals and Reports
- Manufacturing Operating Procedures
- Measurement and Calibration
- Non-Conforming Production
- Product Design
- Product Loading and Storage
- Product Specifications
- Production Metrics
- Production Tools
- Prototyping
- Reading Technical Specifications
- Resolving Production Problems
- Standard Operating Procedures
- Warehousing Operations & Distribution

### **Productive Lab Hours**

0 - 100

#### MANUFACTURING SKILLS (Ratio 1:3)

- Equipment Repair Procedures
- Inspection Equipment Procedures
- Production Equipment Procedures
- Standard Operating Procedures
- Test Equipment Procedures

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



**EXPANSION FUNDS** 

## **Training Proposal for:**

# **Wonderful Pistachios & Almonds LLC**

## Contract Number: ET22-0148

Panel Meeting of: November 19, 2021

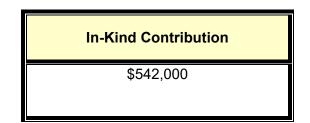
ETP Regional Office: San Diego

Analyst: J. Lima

## PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA Expansion Funds (Alt/Gen)		Industry Sector(s):	Manufact	turing (E)
				Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	Fresno, Kern		Repeat Contractor:	Yes 🗌 No	
Union(s):	🗌 Yes 🛛 No				
Number of Employees in:		CA: 1,140	U.S.: 7,000		Worldwide: 9,000
<u>Turnover Rate</u> :		10%			
Managers/Supervisors: (% of total trainees)		2%			

## FUNDING DETAIL



Total ETP Funding
\$499,744

## TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours		Average Cost per	
No.			Trainees	Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Cont. Imp., Computer Skills,	679	8-200	0	\$736	**\$15.00
	HUA Priority Rate	Mfg. Skills, Business Skills, PL-Mfg. Skills		Weighte 32	•		

#### \*Post-Retention Wage is the Contractual Wage.

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

**Minimum Wage by County:** Job Number 1 (HUA): \$14.34 per hour for Fresno and Kern counties

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

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

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

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
		25				
Administrative Staff		15				
		10				
		20				
Customer Service Staff		15				
		10				
		40				
Engineering Staff		20				
		10				
		41				
Maintenance Staff		20				
		10				
Managara/Supan/jaara		10				
Managers/Supervisors		5				
		180				
Production Workers		65				
		50				
Quality Staff		25				

ET22-0148

	10
	4
	54
Technical Support Staff	30
	10

#### **INTRODUCTION**

Founded in 1989 and headquartered in Lost Hills, Wonderful Pistachios & Almonds LLC (Wonderful) (<u>www.wonderful.com</u>), requests funding for its employees and two closely affiliated entities, Wonderful Growers Cooperative and Cal Pure Produce Inc. All three entities are wholly-owned subsidiaries of the Wonderful Company LLC in Los Angeles. The Company has six facilities in California: five growing and processing sites in Lost Hills, Firebaugh and Bakersfield; and an office in Los Angeles. International sites include Belgium, China, Korea, India, Mexico, and Brazil. Customers include retail and wholesale food distributions worldwide such as Costco, Wal-Mart, Tesco, Blue Diamond, Planter's, Kraft, Trader Joe's, and Whole Foods. Training will take place at Lost Hills and Firebaugh locations.

Wonderful farms 125,000 acres of almonds and pistachios (in tandem with grower partners) that harvest approximately 600 million pounds annually. The Company's grows, processes, and markets its product to ensure quality. Its products are sold under the Wonderful label, as well as private-label, to food manufacturers and foodservice customers across the US and worldwide. Wonderful also offers in-shell and shelled pistachios, along with various almond products, including whole, sliced, slivered, or diced, all of which are supplied in raw, roasted, blanched, and flavored forms

#### Veterans Program

Wonderful is working to recruit Veterans into its workforce through its website, job fairs and other forms of outreach. However, this project does not include training for Veterans.

#### PROJECT DETAILS

This will be Wonderful's fifth ETP Contract, and the fifth in the last five years. Previous training focused on improving productivity and training on Wonderful Improvement Network (WIN), a Lean Manufacturing software program. Training will focus on more complex operations, attracting new customers and implementing a new continuous quality improvement training program. In addition, Wonderful must keep up with technological advances, industry requirements and customers' expectations to remain competitive in the marketplace. This involves extensive training to put processes and practices into place quickly, while maintaining superior quality standards.

In the past year, the Company has hired 100 employees under the ETP COVID Pilot Program. Training will enable the Company to retain skilled workers, remain competitive, attract new customers and promote continued growth.

ETP funding will help Wonderful to lead in the manufacturing marketplace, attract new customers and provide the most cutting edge products. Wonderful has developed a company-wide training program to modernize business practices and procedures. Workers will gain skills to optimize job performance, promote company growth, better serve customers and improve efficiencies. Training is essential to the Company's business operations and success.

#### Training Plan

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

**Business Skills**: Training will be provided to all occupations and include Communications Skills and Marketing Strategies.

**Computer Skills**: This training will be provided to all occupations and include Computer Security and Inventory Management Software.

**Continuous Improvement**: Training will be provided to all occupations and include Team Problem Solving and Productivity Improvement Techniques.

**Manufacturing Skills**: Training will be provided to Production Workers, Maintenance and Technical Support Staff and include Equipment Maintenance and Repair, Product Sorting Procedures and Quality Control.

#### **Productive Laboratory**

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

Trainees in the occupations of Production Worker, Maintenance, Technical Support and Engineering Staff will learn how to operate proprietary equipment that requires hands-on experience.

The trainer-to-trainee ratio will be 1:5 or less. Most training will be provided in a 1 on 1 environment. There may be cases when instructors are not available to provide 1 on 1 training. Rather than delay the training, Wonderful requests a slightly high trainer to trainee ratio of 1 to 5. This will allow the Company to maintain production volume while workers are being trained.

#### High Unemployment Area

Wage and Retention Modifications

All trainees work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average. The Company's locations in Kern and Fresno County are in an HUA. The Company requests a wage modification for these workers.

#### Commitment to Training

Wonderful spends approximately \$555,000 annually for training at its California locations and includes new-hire orientation, OSHA mandated training, sexual harassment prevention training and first aid training. The Company has an on-the-job training program for manufacturing skills. MS Office (Basic level) is provided on an as-needed basis.

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 begin upon Panel approval. Wonderful has designated a team of eight staff that includes a Director of Training, a team of Managers/Supervisors and a Training Coordinator to oversee ETP training and administrative responsibilities. A Team of Managers/Supervisors and

trainers will travel to each location to provide training, secure rosters and ensure ETP compliance. The Company has also retained a third party to assist with administrative duties.

#### **Green/Clean Operations**

Since 2007, Wonderful has operated with the help of solar power. Each year, the Lost Hills facility uses power from the city's 1.1 mega-watt, \$7.5 million solar plant that supplies about 15% of the city's energy. The alternative power generated by the plant eases the burden on the local power supply and on the California power grid. Wonderful has also invested \$2.5 million to install its own power substation at the Los Hills facility.

#### Impact/Outcome

Wonderful is working to improve production processes and company profitability. Removing waste in the production process makes better use of company resources and helps the company grow. Sustained growth creates a more stable workforce and keeps jobs in California.

#### **Repeat Contractor Rule**

The Panel's "Repeat Contractor Rule" imposes a waiting period and other limitations regarding when a contractor may submit a subsequent Preliminary Application:

- Contractors must wait until 18 months have passed in their current contract before submitting a Preliminary Application for a second contract. However, the current active COVID Pilot (ET21-0206) does not apply to the Repeat Contractor Rule.
- If the current contract does not meet 75% completion rate, as determined using the potential earned amount, then the second contract will be right-sized accordingly.

#### Temporary to Permanent Hiring

The Company will train 25 workers under Panel guidelines for the Temporary-to-Permanent program (Job Number 1). The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for "converting" temporary workers into full-time permanent employment is 90 days. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

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

### ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0206 (COVID)	\$200,000	12/14/20 to 12/13/22	100	70	NA

Based on ETP Systems, Wonderful's reimbursable hours have been tracked for potential earnings of \$140,000 (70% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through September of 2022.

### PRIOR PROJECTS

The following table summarizes Contractor's performance under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0340	Lost Hills, Firebaugh, Bakersfield, and Los Angeles	12/14/18 to 12/13/20	\$406,120	\$406,120 (100%)
*ET17-0117	Lost Hills, Firebaugh, Bakersfield, and Los Angeles	07/01/16 to 06/30/18	\$749,070	\$407,882 (55%)
ET15-0323 (Drought)	Lost Hills, Firebaugh, Bakersfield, and Los Angeles	11/24/14 to 11/23/16	\$743,400	\$740,538 (99%)

ET17-0117: The Company was unable to utilize 100% of ETP funding due to production demands during scheduled training.

### **DEVELOPMENT SERVICES**

National Training Company, Inc. (NTC) in Irvine assisted with development for a flat fee of \$15,000

#### ADMINISTRATIVE SERVICES

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

#### TRAINING VENDORS

To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200

Trainees may receive any of the following:

#### CONTINUOUS IMPROVEMENT

- Productivity Improvement Techniques
- Standard Work Instructions
- Team Problem Solving
- Wonderful Improvement Network

#### **COMPUTER SKILLS**

- Computer Security
- Computerized Inventory
- Internal Applications
- Inventory Management Software
- Manufacturing Resource Planning Software
- Microsoft Applications (Intermediate/Advanced)
- Project Management Software
- Small Packaging Software
- Web-Based Computer Applications

#### MANUFACTURING SKILLS

- Compliance Tracking
- Covid-19 Procedures
- **4** Equipment Cross-Training
- 4 Equipment Maintenance and Repair Skills
- Equipment Safety Procedures
- Covid-19 Procedures
- Equipment Set-Up and Testing
- **4** Food Processing Equipment
- Forklift Procedures
- Good Manufacturing Practices
- **4** Inspection Equipment
- 4 Inventory & Raw Materials Training
- Lot Traceability
- **4** Manufacturing Operating Procedures
- Product Sorting Procedures
- Product Specifications
- Quality Control
- **4** Reading Technical Specifications
- Resolving Production Problems
- Safety Quality Food Certification
- Sanitation
- **4** Standard Operating Procedures
- Water Recycling

#### **BUSINESS SKILLS**

- Accounting Skills
- **4** Business Process & Performance
- Communication Skills

- Marketing Strategies
- + Product Knowledge

#### **Productive Lab Hours**

0-100

#### MANUFACTURING SKILLS (ratio 1:5)

- **4** Equipment Maintenance and Repair Procedures
- Inspection Procedures
- Packaging and Shipping Procedures
- Production Procedures
- **4** Standard Operating Procedures

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

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



## **EXPANSION FUNDS**

## **Retrainee-Job Creation**

## **Training Proposal for:**

# Apeel Technology, Inc. dba Apeel Sciences

## Contract Number: ET22-0172

Panel Meeting of: November 19, 2021

ETP Regional Office: Economic Development Unit

Analyst: R. Meyer

## PROJECT PROFILE

Contract Attributes:			Industry Sector(s):	Services (G) Agriculture (11) Priority Industry: ⊠Yes □No	
Counties Served: Riverside, Tular Barbara, Ventur		-	Repeat Contractor:	Yes 🗌 No	
Union(s):	🗌 Yes 🛛 No				
Number of Employees in:		CA: 288	U.S.: 355		Worldwide: 499
<u>Turnover Rate</u> :		3%			
Managers/Supervisors: (% of total trainees)		9%			

## FUNDING DETAIL

In-Kind Contribution

\$930,000

Total ETP Funding	
\$599,656	

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills	257	8-200 Weightee 48	•	\$1,104	\$25.00
2	Priority Rate Job Creation	Business Skills, Commercial Skills, Computer Skills	202	8-200 Weighte 68	•	\$1,564	\$25.00

#### \*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$19.12 for Riverside, Santa Barbara, Tulare and Ventura counties Job Number 2 (Job Creation): \$15.65 for Riverside, Santa Barbara, Tulare 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

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

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1 (Retrainee)						
Operations Staff		66				
Product Staff		14				
Engineering Staff		52				
Finance Staff		14				
Marketing Staff		20				
People & Culture Staff		10				
Sales Staff		12				
Strategy Staff		18				
Technology Staff		27				
Manager/Supervisor		24				
Job Number 2 (Job Creation)						
Operations Staff		42				
Product Staff		12				
Engineering Staff		44				
Finance Staff		6				

Marketing Staff	12
People & Culture Staff	9
Sales Staff	18
Strategy Staff	14
Technology Staff	27
Manager/Supervisor	18

#### RESPOND

Under its Rapid Employment Strategies Pilot on Natural Disasters (RESPOND) pilot program, the Panel funds training for economic recovery from natural disasters, such as drought, earthquake, COVID-19, and catastrophic wildfire. All projects eligible for funding under the RESPOND Pilot Guidelines will be deemed as "Critical Proposals" with maximum flexibility and an expedited development/approval process. Apeel Technology, Inc. dba Apeel Sciences (Apeel) proposal is determined eligible as a RESPOND project based on the impact Apeel technology has had in preventing food waste within the produce supply chain impacted by the COVID-19 pandemic and drought in California.

#### INTRODUCTION

Founded in 2012, Apeel (<u>www.apeelsciences.com</u>) provides plant-derived technology extending the shelf life of produce. This involves adding a layer of *plant-derived* protection to the surface of fresh produce to slow water loss and oxidation, which are the factors that cause spoilage. Produce with Apeel stays fresh two to three times longer, promoting more sustainable growing practices, better quality food, and less food waste. This technology has been proven effective at minimizing food waste and reducing the rate of spoilage for dozens of USDA Certified Organic and conventional produce categories.

For growers, suppliers and retailers, Apeel is the only post-harvest solution that creates an optimal microclimate inside every piece of produce, which leads to extended shelf life and transportability with reduced reliance on refrigeration and controlled atmosphere. Apeel works with partners ranging from smallholder farmers and local organic growers to the world's largest food brands and retailers.

Headquartered in Goleta, the Company has California locations in Oxnard, Camarillo, Santa Paula and Murrieta. Apeel has expanded to include facilities in Kentucky, New Jersey, Texas and Washington as well as Mexico, Netherlands and Spain. Over the next two years, the Company is committed to install in Cutler and Porterville with other locations still in the planning stages. The training in this proposal will be provided at the corporate headquarters in Goleta.

This will be Apeel's third ETP Contract, and the third in the past five years. The training in this proposal will expand on and not duplicate training previously provided for existing workers. The creation of new Apeel products, have driven the need for new training topics on new equipment, data analytics, proprietary technologies, new processes and evolving services.

#### Veterans Program

Apeel employs a number of Veterans at its California sites, but does not have a formal Veterans outreach program. However, the Company has recently connected with Veteran representatives working with local Workforce Development Boards in Ventura, Riverside and San Diego Counties to participate in Veteran's outreach and recruitment efforts.

#### PROJECT DETAILS

Due to the increasing demand of the food supply chain which surged during the COVID-19 pandemic and increased stresses on agricultural production due to catastrophic drought, Apeel continues to rapidly expand its technology, data analytics and technology services across global markets. Coupled with this expansion is a significant need to keep its workforce skilled and continue to allow the company to address the global food crisis by reducing food waste with a competitive advantage. This is crucial because innovation and new technologies required to maintain food supply chain resiliency are more essential than ever. In fact, several competitors continue to enter the agricultural and produce preservation marketplace, competing with Apeel domestically and internationally.

To augment Apeel's expansion into data analytics, the Company acquired Impact Vision (2020) which provides additional capacities to assess and evaluate the interior quality of fresh produce by collecting quantifiable data on the stage of ripeness, freshness, nutritional density and other indicators of quality. Apeel continues to have aggressive growth targets, projecting 1,500 global employees by the end of 2023, including 620 full-time workers located in California.

The proposed training will focus on tools and technical skills required to create and apply Apeel products. Training will also enable the company to keep up with the research and development of this cutting-edge technology that preserves and reduces food waste, the demands of the supply chain, as well as its company's growth. Training will also provide employees the importance of sustainability and understanding the environmental impacts of the Apeel technology and ways it can reduce its operational footprint as a business and as individuals. This is embedded deeply within the company's daily operations, which is central to Apeel's core values as an organization and to its mission and vision.

#### **Retrainee - Job Creation**

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

There has been a significant demand in Apeel's technology and product offerings, particularly during the COVID-19 pandemic and the increased impact of drought on agriculture production. To meet this demand, Apeel is hiring 202 newly-created positions (Job Number 2) in Operations, Marketing, Engineering and Technology. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

#### Training Plan

Training will be delivered via Class/Lab and E-Learning in the following:

**Commercial Skills:** Training offered to all occupations and includes food handling and production, equipment installation, equipment cleaning, process updates, site reliability, product and produce quality, product training, as well as safety training.

**Computer Skills:** Training will be offered to all occupations. This training will include intermediate and advanced computer software and computer research skills to help trainees work more effective.

**Business Skills:** Training will be offered to all occupations and will include analysis, research, delivery, communication, collaboration tools and sales/marketing tools. Training will focus on internal business systems and functionality to create a more efficient business.

#### High Unemployment Area

During the contract term of the project, the company intends on expanding into Tulare County facilities located in Culter and Porterville. These two cities are currently designated as High Unemployment Areas (HUA) with unemployment exceeding the state average by at least 25%. The Company is not requesting a wage modification.

#### Alternate Recordkeeping

Apeel requests the use of alternate record keeping as part of this project for training delivered and is approved under the COVID 19 Response plan.

#### Other Resources

The Company is not currently applying or has it received incentives, including Cal Competes related to this expansion effort. Apeel will engage the Governor's Office for Economic Development or local Workforce Development Boards for any needed incentive or workforce development assistance.

#### Commitment to Training

Apeel spends approximately \$930,000 annually for staff training. Training includes new hire orientation, business related and industry specific skills, State-mandated training, and elective courses for personal enrichment. ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

> Training Infrastructure

Apeel's Director of Learning, Development and Engagement will be responsible for overseeing all aspects of the contract and will lead a team of five staff members who will provide training and manage internal administration. Apeel has a detailed training schedule in place and is ready to begin training upon Panel approval. An outside administrative consultant has also been retained to ensure that all training records meet ETP compliance. 1

### ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0190	\$200,000	10/26/20 – 10/25/22	100	55	55
ET21-0131	\$599,472	7/27/20 – 7/26/22	442	0	0

ET21-0190 (COVID PILOT): 220 reimbursable hours have been tracked for potential earnings of \$110,000 (55% of approved amount). The Contractor projects final earnings of 100% by the end of March 2022.

ET21-0131: 23,478 reimbursable hours have been tracked for potential earnings of \$540,008 (90% of approved amount). The Contractor projects final earnings of 100% by December 2021.

## **DEVELOPMENT SERVICES**

Aescher Consulting in Pasadena assisted with the development of this proposal at no cost.

## **ADMINISTRATIVE SERVICES**

Aescher Consulting will also perform administrative services for a fee not to exceed 12% of payment earned.

#### **TRAINING VENDORS**

To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8-200 Trainees may receive any of the following:

#### **COMMERCIAL SKILLS**

- Food Handling and Safety
- Brush Bed and Drying Systems
- Clean In Place and Washing/Sanitizing Equipment
- Edipeel
- Gamma System
- General Process Equipment
- Inline Application System Cleaning
- Lab Safety Training
- Mixing
- Motors and Electrical Systems
- Peracetic Acid Handling
- Packing House Safety
- Produce Industry
- Product Development
- Product Quality
- Product Training
- Reliability, PM, and Spare Parts
- System-Specific Cleaning
- Tubing, Piping, Fittings, Nozzles and Sprayers
- Valves and Pumps

### **BUSINESS SKILLS**

- Ally Skills
- Authentic Leadership
- Building Solid Teams
- Business Acumen
- Business Initiatives
- Business Systems
- Change Management
- Coaching Skills
- Collaboration
- Communication Skills
- Conflict Management
- Conflict Resolution
- Continuous Improvement
- Crucial Conversations
- Culture & Traditions
- Customer Experience
- Customer Solutions
- Customer Success
- Delegation
- Design Thinking
- Difficult Conversations

- Distribution Training
- Diversity, Equity & Inclusion
- Documentation Review
- Effective 1:1s
- Effective Communication
- Emotional Intelligence
- Employee Engagement & Action Planning
- Engineering & Product Training
- Executive Development
- Feedback Skills
- Financial Acumen
- Financial Tools
- Focus & Prioritization
- Goal-Setting
- Global Leadership
- Growth & Partnerships
- High Impact Hiring
- Intercultural Training
- Influence & Persuasion
- Industry Trends
- Innovation
- Interviewing Practices
- IP Intellectual Property
- Leadership Development
- Leadership Styles
- Leading Teams
- Marketing
- Meeting Management
- Negotiation
- New Hire Onboarding
- New Leader Assimilation
- New Manager Training
- New Team Alignment
- One Sided vs Two Sided Business Models
- Performance Management
- People Team Continuous Learning
- Presentation Skills
- Product Management Skills
- Product Training
- Productivity & Prioritization
- Product Road Map
- Project Management
- Project Leadership
- Quality Assurance
- Sales Operations
- Sales Skills
- SCORM
- Strategic Planning
- StrengthsFinder
- Strategic Regional Reports

- Supply Chain Management
- Sustainability Environmental Impact
- Team Strengths
- Tent Pole Sales Strategy
- Third Party Confidentiality Training
- Time Management
- Train the Trainer
- Trust Building
- Unconscious Bias
- Values Selling
- Vision and Values

#### **COMPUTER SKILLS**

- Asana
- BambooHR (HRIS)
- Box
- Clarizen
- Concur
- Coupa
- Culture Amp
- Expensify
- Finance Software
- Fishbowl
- Google Suite
- Greenhouse
- Human Resource Software
- Legal Software
- Learning Management Systems
- Litmos
- MediaWiki
- Okta
- Oracle
- Sales Software
- Slack
- Sphera
- Spoke
- Upkeep
- WorkDay

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



## **EXPANSION FUNDS**

## **Retrainee-Job Creation**

## **Training Proposal for:**

# Applied Composite Structures, Inc. dba Encore Composite Structures, Inc.

## Contract Number: ET22-0173

Panel Meeting of: November 19, 2021

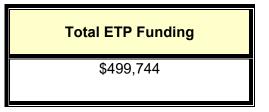
ETP Regional Office: Economic Development Unit Analyst: R. Meyer

### **PROJECT PROFILE**

Contract Attributes:	Expansion Fund Job Creation In Priority Rate	· /	Industry Sector(s):	Manufact Aerospac	turing (E) ce Related
				Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	Orange and Sa		Repeat Contractor:	🗌 Yes 🛛 No	
Union(s):	🗌 Yes 🛛 No				
Number of	Number of Employees in:		U.S.: 770		Worldwide: 770
<u>Turnover Rate</u> :		8%			
<u>Managers/Supervisors</u> : (% of total trainees)		16%			

## **FUNDING DETAIL**

**In-Kind Contribution** \$730,033



## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of	Range of Hours Class /		Average Cost per	Post- Retention
INO.			Trainees	Lab	CBT	Trainee	Wage*
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp, Mfg. Skills, Literacy Skills, OSHA 10/30, PL - Mfg. Skills	409	8-200 Weighter 32	-	\$736	\$19.12
2	Retrainee-Job Creation Priority Rate	Business Skills, Computer Skills, Cont. Imp, Mfg. Skills, Literacy Skills, OSHA 10/30, PL - Mfg. Skills	110	8-200 Weighter 72	•	\$1,656	\$17.50
3	Retrainee-Job Creation Priority Rate Veterans	Business Skills, Computer Skills, Cont. Imp, Mfg. Skills, Literacy Skills, OSHA 10/30, PL - Mfg. Skills	10	8-200 Weighte 72	-	\$1,656	\$17.50

\*Post-Retention Wage is the Contractual Wage.

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

Minimum Wage by County: Job Number 1: \$19.12 per hour for Orange and San Diego
counties. Job Number 2: \$15.93 per hour for Orange County and \$15.81 per hour for San Diego
County. Job Number 3: \$15.93 per hour for Orange County and \$15.81 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?: Set I No Set Maybe

Up to \$1.62 per hour in employer paid health benefits may be used for Job 1 trainees to meet the ETP minimum Wage per County.

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Group 1 - Retrainee						
		1				
Administration		6				
		9				

Engineering	36
Finance	6
	1
Human Resources	5
IT	3
Manager	36
	39
Production	123
	102
	9
Supervisor/Lead	22
Sumply Chain	1
Supply Chain	10
Job Group 2 - Retrainee – Job Creation	
Engineering	9
Manager	4
	28
Production	48
	8
Superviser/Lood	9
Supervisor/Lead	4
Job Group 3 - Retrainee – Job Creation Veteran	
Engineering	1
Manager	1
	2
Production	2
	2
	1
Supervisor/Lead	1

#### **INTRODUCTION**

Founded in 1975, Applied Composite Structures, Inc. dba Encore Composite Structures, Inc. (Applied Composites) (www.appliedcomposites.com) located in Brea is a wholly owned subsidiary of AE Industries Partners. In December 2017, AE Industries Partners acquired Encore Composite Structures and three additional California subsidiaries: Alliance Space Systems LLC dba Applied Composites in Los Alamitos, AC&A Enterprises, LLC dba Applied Composites in Lake Forest, and San Diego Composites, Inc. dba Applied Composites in San Diego.

Applied Composites designs and manufactures complex composite components, assemblies, engineering, and tooling to commercial & general aviation suppliers and manufacturers, military aircraft suppliers and manufacturers; as well as, space systems suppliers and manufacturers. Many of its customers are prime Department of Defense (DOD) contractors and industry leaders including Lockheed, General Atomics, Northrup Grumman, Raytheon, Rolls Royce, GE Aviation, Bell Helicopters, Honeywell, SpaceX, Collins Aerospace, and Boeing.

Applied Composites and their three subsidiaries work together to manufacture for aerospace, defense, commercial and space markets. This is Applied Composites first ETP contract. **Veterans Program** 

A portion of the Company's 41 currently employed Veteran workers will participate in the project in Job Number 1. Additionally, the Company plans to hire and train up to 10 new workers with Veteran status. The Company has hired Bradley Morris, a veteran's recruiter to work with military bases and formalized a partnership with Work for Warriors to expand its Veteran's recruitment effort.

A portion of the Veteran population participating in this project may include transitioning active duty Veterans who are within one year prior to their anticipated separation date from service. The Company is not requesting a wage modification for trainees in Job Number 3.

#### **Retrainee - Job Creation**

In this proposal, Applied Composites will hire 120 new employees (Job Numbers 2 and 3) to meet business-capacity growth. To meet the increase in customer demand and business, the Company is adding occupations in Engineering, Manager, Production and Supervisor/Leads. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will not be subject to a lower post-retention wage.

#### PROJECT DETAILS

Applied Composites has historically served the commercial and defense industries. While the Company continues to build its contracts with legacy customers, it has also made significant inroads into the space market. Applied Composites is pursuing an aggressive growth strategy, projecting growth of 25% in the coming year. The Company is achieving this growth through a focus on new products in areas including engine composites, defense, UAV, Missile Platforms & MRO (maintenance repair overhaul). To be more competitive and to meet new customer demand, the Company is acquiring new equipment including new and upgraded CNC machines; as well as, new inspection and tooling equipment. Also, the Company recently implemented a new ERP system, Epicor, in Brea and Los Alamitos, and will be implementing the same ERP system into its Lake Forest and San Diego facilities in 2022. Both new and established employees will require extensive training on the new system in order effectively implement and utilize this new software to help the company manufacture new products with new production capabilities.

Applied Composites must ensure its workforce has the technical skills and abilities to perform. Training will focus on providing workers with the skills and knowledge needed to adapt to new technology, systems, and customer requirements. Training will ensure that team members are able to utilize systems and equipment to meet customer requirements, which will in turn, expand employment stability and growth opportunities for team members. This will provide both current

and new team members with technical skills and collaborative tools to be most effective in their job, and create growth opportunities within the Company as a whole.

#### **Training Plan**

The following training will be delivered via Class/Lab, E-Learning, Computer Based Training (CBT) and Productive Lab (PL):

**Business Skills** – Training offered to all occupations and will cover a wide range of topics including, but not limited to, product knowledge, procurement, sales, emerging leaders and other strategic skills. Training will focus on providing workers with the skills to ensure effective communication & customer service, manage and meet company metrics and sales goals, as well as effectively manage complex projects.

**Computer Skills**: Employees in all occupations will receive Computer Skills training, based on the technical needs of their job. Staff in all occupations will receive training in the specific aspects of the new ERP system and project management software, in order to more effectively manage projects. Microsoft Office training (Intermediate & Advanced) will be offered to select employees in all occupations to maximize efficiency within their job function. Production and Engineering staff will be the key focus of CAD/CAM training in order to meet customer specifications. ADP training will focus on Human Resources and Administration staff to ensure accurate and effective usage. Cybersecurity will be a priority for all staff.

**Continuous Improvement**: Employees in all occupations will be provided Continuous Improvement training in order to reduce errors, to ensure efficiency and to sustain and enhance growth. Training in Lean Manufacturing, Problem Solving and Quality Management Systems will help current and new employees establish a continuous improvement mentality and focus on working most effectively within their teams and the organization. Engineering, Management, Supervisor and key Production staff will be trained on technical subjects, including ITAR and NADCAP, in order to ensure we are complying with the exacting requirements of our aerospace and defense customer base.

**Manufacturing Skills**: Managers, Engineering and Production staff will receive Manufacturing Skills training to provide staff with the skills to better manage increased production demands that come with growth, including: Assembly and Testing, Equipment Set Up and Operations, and Production and Inventory Management. Technical skills training, including Forklift, Welding, and CNC, will provide workers with the skills to perform these operations effectively and safely.

**Literacy Skills**: Select Production and Supply Chain staff whose limited language skills has been deemed a barrier to their ability to further their skills will have the opportunity to participate in Vocational English as a Second Language.

#### PL – Manufacturing Skills

Trainees may produce goods for profit as part of the PL training in the courses identified under the PL Manufacturing Curriculum. The instructor must be dedicated to training delivery during all hours of training. The Company is requesting to include training on set up and operation of new CNC and other manufacturing equipment used by the Company. Applied Composites has purchased new equipment as well as spent over \$5M in upgrading existing equipment. Training will ensure effective machine operation, maintenance, set up and troubleshooting. The Company plans to train new production workers on the company's production floor at each location. Training will be delivered by a Production Lead with a trainer-to-trainee ratio of 1:1 for all productive laboratory training. Trainers will sign off on a trainee's competency once they have mastered the required processes.

### Certified Safety Training

1. <u>OSHA 10/30.</u> 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.

#### Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0 and 8.5 hours of CBT in Computer Skills, Continuous Improvement and Manufacturing skills.

#### Commitment to Training

Applied Composites spends approximately \$210,000 at each of its facilities for staff training and development annually. This training includes hands-on training and coaching for new and existing employees, including safety, technical skills training, and development opportunities for workers that want to grow their careers. The Company will continue to provide ongoing training during the term of the proposed ETP agreement and beyond at its own expense. 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
  - Applied Composite's Director of Operation Excellence will be responsible for overseeing all aspects of the contract and will lead a team of four (4) staff members, designated as site champions, who will schedule training and manage internal administration to ensure compliance and effective rollout of training. Applied has a detailed training schedule in place and is ready to begin training with in-house subject matter experts upon Panel approval. California Manufacturing Technology Consulting has also been retained to ensure that all training records meet ETP compliance and that training from each location is effectively delivered and tracked. The Company will be using an ETP approved alternative recordkeeping process for this project.

#### Impact/Outcome

Training will focus on providing workers with the skills and knowledge to effectively utilize new technology and systems in order to customer requirements. The skills workers gain will allow them to perform their jobs more effectively and provide them with the ability to adapt to change more readily. The manufacturing practices and systems skills they gain will allow employees to be more productive and keep pace with ever shifting expectations of our expanding customer base.

#### **DEVELOPMENT SERVICES**

The Company retained California Manufacturing Technology Consulting in Torrance, CA to assist with development of this proposal for a flat fee of \$15,000.00.

### **ADMINISTRATIVE SERVICES**

California Manufacturing Technology Consulting 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**

- Conflict Management
- Finance & Accounting
- Goal Setting
- Planning
- Presentation Skills
- Product Knowledge
- Procurement
- Sales & Selling Skills
- Time Management
- Predictive Index (PI)
- Manager Essentials
- Emerging Leaders
- Emotional Intelligent (EQi)
- Leadership & Executive Coaching

#### **COMPUTER SKILLS**

- Adobe Suite
- CAD/CAM Software
- CRM Software
- Cybersecurity
- Enterprise Resource Planning (ERP)
- Microsoft Office (Intermediate & Advanced)
- Project Management Software (PMP)
- SolidWorks
- ADP (HCM & LMS)

#### **CONTINUOUS IMPROVEMENT**

- Design of Experiments (DOE)
- Document Control
- Failure Mode & Effects Analysis (FMEA)
- Internal Auditor
- International Traffic in Arms Regulations (ITAR)
- Leadership Skills
- Lean Manufacturing
- National Aerospace & Defense Contractors Accreditation Program (NADCAP)
- Problem Solving
- DFARS
- Product & Inventory Management
- Quality Control Check Points
- Quality Inspection
- Quality Management Systems
- Risk Management
- Statistical Process Control (SPC)

• Supply Chain Optimization

### MANUFACTURING SKILLS

- Additive Manufacturing
- Assembly & Testing
- Blueprint Reading
- CNC Programming
- Equipment Set Up & Operations
- Ergonomics
- Forklift Training/certification
- Geometric Dimensioning & Tolerancing
- Good Manufacturing Practices
- Hazardous Waste Handling
- Inventory Control
- Lock Out/Tag Out Training
- Machine Set Up & Changeover
- Material Requirements Planning & Processes
- Personal Protective Equipment (PPE)
- Preventative Maintenance
- Production and Inventory Management
- Production Skills
- Safety
- Shop Math
- Workplace Safety and Manufacturing in a COVID Safe Environment
- Welding Skills

#### OSHA 10/30

- OSHA 10
- OSHA 30

#### LITERACY SKILLS

• Vocational English as a Second Language (VESL)

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

#### **Productive Lab Hours**

Range of Hours Trainees may receive any of the following: 2-60

#### PL - MANUFACTURING SKILLS

- Equipment Set up & Operation
- CNC Machines
- Composite Lamination Process
- Assembly & Bonding Operations
- Grinding & Hand Finishing Operations
- Autoclave & Oven Operations
- Forklift Operations
- Painting Operations
- Inspection Operations

## CBT Hours

Range of Hours 0 - 8.5 Trainees may receive any of the following:

#### **COMPUTER SKILLS**

- Cyber Security Basics (1 hour)
- ERP System (1 hour)

#### **CONTINUOUS IMPROVEMENT**

- Effective Business Writing (2 hours)
- Interpersonal Communication (1 hour)
- Managing Information Overload (1 hour)

#### MANUFACTURING SKILLS

- Ergonomics for Manufacturing (1 hour)
- Head and Eye Protection (0.5 Hour)
- Respiratory Protection (0.5 Hour)
- Slip, Trip and Fall Protection (0.5 Hour)

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



## **EXPANSION FUNDS**

## **Retrainee-Job Creation**

## **Training Proposal for:**

# **BioMarin Pharmaceutical Inc.**

## Contract Number: ET22-0158

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: S. Wang

## PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate Expansion Funds (Alt/Gen)		Industry Sector(s):	Manufacturing (E) Biotechnology and Life Sciences (54+) Priority Industry: Xes No		
Counties Served:	Marin		Repeat Contractor:	🛛 Yes 🗌 No		
Union(s):	🗌 Yes 🖾 No					
Number of Employees in:		CA: 2,300	U.S.: 3,400		Worldwide: 3,400	
Turnover Rate:		7%				
Managers/ (% of total tra	Supervisors: inees)	7%				

## **FUNDING DETAIL**

In-Kind	
\$960,000	

Total ETP Funding	
\$494,500	

# TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	
1	Retrainee Priority Rate	Computer Skills, Cont. Improv., PL - Mfg. Skills	325	8–200 0–80 Weighted Avg: 60		\$1,380	\$26.48
2	Retrainee Job Creation Priority Rate	Computer Skills, Cont. Improv., PL - Mfg. Skills	25	8–200 Weighte 80		\$1,840	\$25.86

#### \*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Marin County - \$20.86 per hour for Job Number 1 and \$17.39 per
hour for Job Number 2.
Health Benefits: Xes 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	Actual Wage Range	Estimated # of Trainees			
Job Number 1: Retrainee					
Administrators		25			
Engineers		150			
Managers / Supervisors		20			
Operators		130			
Job Number 2:	Job Creation				
Administrators		5			
Engineers		5			
Managers / Supervisors		5			
Operators		10			

# **INTRODUCTION**

Founded in 1997 and headquartered in San Rafael, BioMarin Pharmaceutical Inc. (BioMarin) (<u>www.biomarin.com</u>) is a global biotechnology company that develops and commercializes innovative therapies and medications for patients with serious autoimmune and life-threatening rare and ultra-rare genetic diseases. The Company's portfolio consists of seven commercialized products and multiple clinical and pre-clinical product candidates. ETP-funded training will be delivered at its headquarters in San Rafael and at its primary manufacturing facility in Novato.

In 2020, BioMarin completed the build out of its commercial-scale gene therapy manufacturing facility located in Novato and began production of therapies to support clinical development activities and anticipated commercial demand. Recently, the European Commission (EC) granted marketing authorization for VOXZOGO® (vosoritide), which is a once-daily injection to treat achondroplasia in children from the age of 2 until growth plates are closed after puberty when children reach final-adult height. Achondroplasia is the most common cause of dwarfism and Voxzogo is the first medicine to be approved world-wide. BioMarin's customers include specialty pharmacies and end users such as hospitals and government agencies.

This will be BioMarin's sixth ETP project, its fifth within the last five years. In its previous ETP Contract, a major focus of the training was on continuous improvement and computer upgrade initiatives to promote greater collaboration across the Company. In this proposal, training will focus on manufacturing-technology training for frontline technical and management staff involved in research, production, quality control, and technology advancements. BioMarin has agreed to not enroll any employees who have been previously placed in an ETP Contract and confirmed that all proposed courses are new.

### Veterans Program

Even though BioMarin does not plan to include a separate Veteran's Job Number, it has objectives to recruit those with past military experience by building relationships with community-based organizations. The Company attends job fairs focused on the military and provides veterans' awareness training to help hiring managers understand the value of hiring veterans, develop an awareness of the differences of those transitioning out of military service, and addressing the misconceptions sometimes in place around military talent.

#### **Retrainee - Job Creation**

In this proposal, the Company will hire 25 new employees (Job Number 2) due to an increase in business capacity. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. Depending on market conditions in 2022 and beyond, BioMarin's hiring projections will likely exceed the 25 (job-creation goal) by the ETP Contract's term-end date. The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

BioMarin's manufacturing facilities have received cGMP (current Good Manufacturing Procedures) offering dedicated FDA approved manufacturing, quality control, and research laboratory space. According to company representatives, in order to maintain cGMP certification the company must hire and train workers in advanced technical skills to produce quality products in a quick-cycle time to meet its customer needs and to meet FDA requirements.

## PROJECT DETAILS

Training will foster a high level of innovation and product development, knowledge of critical IT systems, and create a high-level of communication, professionalism, and ethics across the organization. All proposed training will provide trainees skillsets that are transferable throughout the life science industry.

### Training Plan

Training be provided to all occupations via Class/Lab/E-Learning, Productive Lab (PL), and Computer-Based Training (CBT) in the following:

**Computer Skills**: Training course topics include Advanced Desktop Productivity Applications, Advanced eBusiness Applications, Advanced Manufacturing Control Systems, and Business System Processing to ensure proper knowledge while using these systems.

**Continuous Improvement**: Training course topics include Clean Room Operations, Design Tools and Practices, Design for Excellence, and Leadership / Coaching Skills. Trainees will gain skills to implement significant improvements in productivity enhancements, decision-making, corrective and preventative actions, management controls, process validation, and biotechnology compliance.

# Productive Laboratory (PL- Manufacturing Skills)

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

Frontline Manufacturing Operators who directly interface with new and/or improved manufacturing processes and new equipment will receive PL- Manufacturing Skills' training. This PL training will provide cross-training opportunities on the production lines and procedures used throughout the manufacturing facility. The projected number of employees who will attend PL training is 350. All PL training will occur in a cleanroom manufacturing setting conducted by a qualified trainer.

The trainer-to-trainee ratio for all PL training will be 1:1. PL training will be delivered by highly skilled trainers who are internal production supervisors, technicians, and engineers. A trainee observes real production procedures demonstrated by the lab trainer and will practice their skills under the supervision of the trainer. Upon certification of their competency, the trainee is able to independently produce goods that are for sale.

# Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0–80 hours of CBT.

# Commitment to Training

BioMarin is ready to begin training upon Panel approval. The Company's statewide training expenditures in California for non-ETP related training is in excess of \$1,250,000. The ETP curriculum will build on (not overlap) basic instruction and orientation training already provided by the Company. BioMarin 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 training programs. BioMarin will continue to fund such training, and any training hours delivered beyond the 60-hour (per trainee) cap for PL 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

BioMarin's Manager of Government Affairs (dedicated administrator) will oversee all ETP funded training. The Company will utilize several internal trainers to deliver training, and administrative staff will be responsible for scheduling, delivering, and documenting training. In addition, BioMarin will use the services of an experienced third-party administrator to assist with ETP's online systems and ETP staff.

# Electronic Recordkeeping/LMS

Staff has reviewed and approved the Company's Learning Management System (LMS).

## Impact/Outcome

Training goals and objectives have been designed to expand trainee skills enabling them operate biopharmaceutical tools/equipment in an advanced manufacturing setting (clean room). The equipment/technology skills' certifications attained by staff who successfully complete training include the operation, calibration, and maintenance of advanced biotech manufacturing equipment. Another objective is to deliver training programs and systems that enable staff to be successful in their role while developing professionally. Providing marketable skills to staff through BioMarin sponsored training is a high priority.

# ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0171	\$200,000	10/5/20 – 10/4/22	100	100	100

Based on ETP systems, 412 reimbursable hours have been tracked for potential earnings of \$200,000 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through July 2021.

# PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET20-0116	San Rafael and Novato	8/5/19 – 8/4/21	\$749,800	\$749,800 (100%)
18CS-0014	San Rafael and Novato	7/3/17 – 7/2/19	\$823,969	\$823,969 (100%)
ET16-0152	San Rafael and Novato	9/8/15 — 9/7/17	\$843,300	\$843,300 (100%)

# **DEVELOPMENT SERVICES**

BioMarin 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/E-Learning Hours

8–200

Trainees may receive any of the following:

## **COMPUTER SKILLS**

- Advanced Desktop Productivity Applications
- Advanced eBusiness Applications
- Advanced Manufacturing Control Systems
- Advanced Manufacturing Lab Applications
- Business System Processing
- Management and Manufacturing Control Software Systems
- Materials and Logistics Software Development
- Programming Languages
- Project Management Software Tools
- Software and Informatics

# **CONTINUOUS IMPROVEMENT**

- Clean Room Operations
- Design for Excellence
- Design Tools and Practices
- Lab Automation and Robotics
- Leadership / Coaching Skills
- Problem Solving Tools and Techniques
- Product Quality and Reliability
- Quality Fundamentals / Core Skills
- Restricting of Hazardous Substances
- Technical Qualifications and Certifications
- Testing and Troubleshooting Skills

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

### Productive Lab Hours (1:1)

0–60

# MANUFACTURING SKILLS

- Biochemical Analyzers
- Biomolecular Interaction Analysis Instruments
- C02 and Carbon Dioxide Transmitters
- Cell Harvesting Systems
- Cell / Colony Counters
- Chemical Synthesizer Instruments
- Cryocooler Systems
- Electrophoresis Analysis Equipment
- Flow Cytometry Instruments
- Gas Chromatography Equipment
- Laboratory Incubators, Pumps, Dryers
- Liquid Handling Equipment
- Mass Spectrometers

- Microarray Imaging Microscopes
- Microplate Instrumentation
- Oxygen Measurement Instruments
- Particle Analysis and Characterization Systems
- Pharmaceutical Tablet Testing Equipment

## **CBT Hours**

0–80

## **COMPUTER SKILLS**

- Advanced CAD/CAM Applications (11 hrs.)
- Advanced Project Management Software (8 hrs.)
- Computer Assisted Design (4 hrs.)
- Database Design (9 hrs.)
- Electronic Record Management (1.5 hrs.)
- Manufacturing Resources Planning (0.5 hrs.)
- SAP Management and Manufacturing Control Systems (16 hrs.)

## **CONTINUOUS IMPROVEMENT**

- Advanced Customer Communications and Awareness (1 hrs.)
- Effective Teams (2 hrs.)
- Marketing Promotion and Strategy (9 hrs.)
- Multi-cultural Customer Service Relationships (3 hrs.)
- Problem Solving Tools and Techniques (5 hrs.)
- Process Improvement Training (6 hrs.)
- Product Marketing for Engineers (3 hrs.)
- Technical Presentation Skills (1 hrs.)

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



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

# **Training Proposal for:**

# **On-Time Air Conditioning & Heating, LLC**

# Contract Number: ET22-0149

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

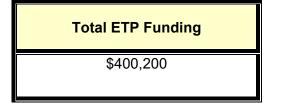
# PROJECT PROFILE

Contract Attributes:	Expansion Fund Priority Rate Retrainee	ζ , , ,	Industry Sector(s):	Construc	tion (C)
Job Creation Initiative		tiative		Priority Ir	ndustry: 🛛Yes 🗌No
Counties Served:	Alameda, Place Costa, Santa Cl	•	Repeat Contractor:	🛛 Yes	🗌 No
Union(s):	🗌 Yes 🛛 No				
Number of	Employees in:	CA: 312	U.S.: 312		Worldwide: 312
<u>Turnover R</u>	late:	8%			
Managers/Supervisors: (% of total trainees)		0%			

# **FUNDING DETAIL**

In-Kind Contribution

\$567,000



# TRAINING PLAN TABLE

Job	lob Description	Tune of Training	Estimated No. of	Range of Hours		Average Cost per Trainee	Post- Retention
No.	No. Job Description Type of Training		Trainees	Class / Lab	CBT		Wage*
1	Retrainee	Business Skills, 200 Commerical Skills,		8–200	0	\$1,725	\$19.12
	Priority Rate	Computer Skills, Continuous Improvement		Weighted Avg: 75			
2	Job Creation Retrainee Priority	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	32	8–200 Weighte 75	•	\$1,725	\$19.00

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1: \$19.12 per hour for Placer County; \$20.79 per hour for Contra Costa County; and, \$20.86 per hour for Alameda and Santa Clara counties.
Job Number 2: \$15.65 per hour for Placer County; \$17.33 per hour for Contra Costa County; and, \$17.39 per hour for Alameda and Santa Clara counties.
Health Benefits: ∑ Yes ∑ No This is employer share of cost for healthcare premiums – medical, dental, vision.

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

Up to \$1.86 per hour may be used to meet the Minimum Wage by County in Job Number 1.

Wage Range by Occu	ipation	
Occupation Titles Actual Wage Range		Estimated # of Trainees
Job Number 1:		
Lood		8
Lead		8
Service Technician/Installer		65
		89
		2
Customer Service/Dispatcher		4
		8
Corporate Support/Operations Staff		16
Job Number 2 (Job Creation):		
		2
Lead		2
Service Technician/Installer		8
Service Technician/Installer		8

	2
Customer Service/Dispatcher	2
	2
Corporate Support/Operations Staff	6

# INTRODUCTION

Founded in 2003 and headquartered in Pleasanton, On-Time Air Conditioning and Heating, LLC. (OTA) (<u>www.servicechampions.net</u>) is a residential contractor that installs, services and maintains a wide variety of air conditioning, heating and indoor air quality products including thermostats, furnaces, heat pumps, duct work, and insulation. OTA serves residential customers in 120 cities across Northern California. ETP training will be delivered to staff across OTA's five locations in Pleasanton, Martinez, Rocklin, San Jose, and Livermore.

This is OTA's third ETP project, the third in the last five years. The prior ETP Contracts helped OTA upgrade skills to improve the installation of Smart Equipment such as smart thermostat and equipment integration, which allows for remote control of systems by the homeowner. OTA implemented new phone systems that integrated with the Company's software to streamline customer-service calls, and it conducted companywide Service Titan training which is an Enterprise Resource system with cloud capability to streamline activities.

ETP-funded training in this proposal will enable the Company to provide skills-upgrade training for incumbent and newly hired staff to stay current with new technologies and systems used in the residential HVAC construction industry. The proposed project supports business growth that led OTA to acquire a new business location in Martinez as it outgrew its Concord location. While some topics are similar to those provided in the prior Contract, training in this proposal is updated from prior curriculum.

# Veterans Program

Even though OTA is not including a separate Veteran Job Number, it works directly with Hicks professional group (a certified disabled Veterans Business Enterprise) to recruit and hire veterans in addition to internal hiring done directly by OTA where veterans are targeted for hiring.

# Retrainee - Job Creation

In this proposal, OTA plans to hire 32 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Due to business-capacity growth, OTA reports it is moving from its old Concord location into a new and larger facility in Martinez. Furthermore, the Company confirms it has ample space in its existing facilities to hire these new employees.

Since 2003, OTA has grown to an estimated 312 full-time employees while hiring nearly 82 new staff in the last 12–24 months alone. Demand for heating, ventilation, and air conditioning (HVAC) services is projected to increase in the next five years due in part to the growing popularity of energy-efficient systems for home installation. Some business growth was previously reported to be at least in part related to Title 20 and 24 California Code of Regulation requirements that included new efficiency standards. OTA represents that the recent COVID-19 pandemic highlighted air-quality concerns that is fueling the most recent business growth in HVAC markets.

# PROJECT DETAILS

In this proposal, OTA acquired new lab equipment to offer a new product (Daikin Fit Smart HVAC) to keep up with its increased demand because suppliers were falling behind customer demands.

# Training Plan

The following ETP training will be conducted via Class/Lab and E-Learning delivery methods:

**Business Skills**: Training will be offered to all occupations on topics such as Marketing and Communication Skills to upgrade quote and finance skills. In addition, training on new products and services will help better assist residential customer service and dispatch functions.

**Commercial Skills**: Training will be offered to Service Technicians/Installers and Leads on courses such as Residential Electrical/Plumbing Equipment Installation/Maintenance Skills and System Troubleshooting to upgrade the skills needed to serve residential customers with cooling and heating needs. This training is designed to help OTA keep pace with new innovations.

**Computer Skills**: Training will be offered to all occupations specifically on the systems that each individual trainee utilizes in their daily-job function. Topics such as Payment Card Certification and Mobile Device Applications will be delivered to help the Company meet its efficiency goals.

**Continuous Improvement**: Training will be offered to all occupations. The goal is to improve OTA's efficiency and productivity by implementing improved processes throughout the organization. As OTA continues to grow and add new products and technologies, skills such as change management, leadership skills, process mapping/process improvement, project management, and time management will help the Company work efficiently to remain competitive.

### Impact/Outcome

With ETP funding for the supplemental training proposed in this project, OTA will be able to do the following: meet industry-wide talent shortfalls created by anticipated increases in retirement thru 2022, while meeting simultaneous growth in the demand for services; improve efficiency and competiveness with new product and service offerings (Daikin Fit Smart HVAC); and, support the growth in demand and expansion into new territories as the Company continues to grow.

# **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. The Company's annual training budget for all California sites is approximately \$1,000,000. The Company provides new hire orientation, Cal OSHA required training, ladder safety, lifting safety, on-the-job training (OJT), and sexual-harassment-prevention training at its own expense.

In addition, the Company will be providing CPR certification training to all of its Technicians and Installers. Mandatory training is delivered company-wide, but some training may be department or job-specific training. OTA delivers training through various methods such as classroom, lab settings, OJT, and E-Learning for its satellite offices. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### Training Infrastructure

OTA's Training Director (dedicated administrator) will be in charge of the ETP project, along with one Manager at each of its five participating facilities to help manage the project internally. OTA

has three internal trainers identified to deliver the training. OTA has also hired an experienced third-party subcontractor to assist with ETP administration.

## Recordkeeping

Due to the COVID-19 pandemic, an Alternative Recordkeeping (ARK) method is being requested.

## PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0326	Pleasanton	12/31/18 - 3/29/21	\$312,000	\$312,000 (100%)
ET17-0197	Pleasanton	9/6/16 - 9/5/18	\$413,000	\$412,496 (99.8%)

# **DEVELOPMENT SERVICES**

OTA retained TFP in Huntington Beach to assist with development of this proposal for a flat fee of \$21,735.

# **ADMINISTRATIVE SERVICES**

The Company also retained TFP to 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/E-Learning Hours

8–200

Trainees may receive any of the following:

## **BUSINESS SKILLS**

- Business Processes & Procedures
- Client Service/Communication Skills
- Coordinating and Scheduling Service/Dispatching
- Equipment and Industry Overview
- Finance/Accounting Skills
- Logistics/Warehouse Skills
- Maintenance/Membership Programs
- Marketing/Sales Skills
- New/Upgraded Product Knowledge and Service Skills
- Train-the-Trainer

# COMMERCIAL SKILLS

- Electricity/Voltage & Schematics
- Daiken Fit System Skills
- Elimination of Natural Gas Usage
- Residential Cooling/Heating Equipment Installation/Maintenance Skills
- Residential Electrical/Plumbing Equipment Installation/Maintenance
   Skills
- Residential Ducting/Equipment and Installations
- Residential Indoor Air Quality and Updated Technology
- Residential Smart Equipment Technology/Controls
- Sustainability Concepts and Skills
- System Troubleshooting
- Water Filtration Systems

# COMPUTER SKILLS

- Call Center/Dispatch Application Skills
- Intermediate/Advanced Microsoft Office (Word, Excel, PowerPoint)
- Payment Card Certification
- Enterprise Resource Planning (ERP) System
- Mobile Device Applications

### CONTINUOUS IMPROVEMENT

- Change Management Skills
- Leadership Skills
- Problem Solving Skills
- Process Mapping/Process Improvement Skills
- Project Management Skills
- Root Cause Analysis and Remediation
- Time Management Skills

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

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



**EXPANSION FUNDS** 

# **RETRAINEE - JOB CREATION**

# **Training Proposal for:**

# Service Champions, LLC

# Contract Number: ET22-0147

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

# PROJECT PROFILE

Contract Attributes:	rtotramoo		Industry Sector(s):	Construc Services	tion (C) (61,71,72,81,92)
				Priority Ir	ndustry: 🛛Yes 🔲No
Counties Served:	San Bernardino, Orange		Repeat Contractor:	🛛 Yes 🔲 No	
Union(s):	🗌 Yes 🛛 No		·		
Number of Employees in: CA: 45		CA: 452	U.S.: 452		Worldwide: 452
Turnover Rate: 6%					
Managers/Supervisors: 0 (% of total trainees)		0%			

# **FUNDING DETAIL**

In-Kind Contribution

\$630,000

Total ETP Funding
\$345,000

# TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	aining Estimated No. of Trainees		Range of Hours Class / Lab		Post- Retention Wage*
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	150	8–200 Weighte 75	•	\$1,725	\$19.12
2	Retrainee Priority Rate Job Creation	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	50	8–200 Weighte 75	•	\$1,725	\$16.00

\*Post-Retention Wage is the Contractual Wage.

Minimum Wage by County: Job Number 1: \$19.12 per hour for Riverside, San Bernardino and Orange counties. Job Number 2: \$15.93 per hour for Orange County and \$15.65 per hour for San Bernardino County.
Health Benefits: ∑ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ∑ Yes ☐ No ☐ Maybe Up to \$1.12 per hour may be used to meet the Post-Retention Wage for Job Number 1 only.

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1 (Retrainee):						
Lead Staff		8				
Service Technicians/ Installers		20				
Service recrificians/ installers		70				
		1				
Customer Service/ Dispatch		8				
		16				
Corporate Support/Operations Staff		8				
Corporate Support/Operations Staff		19				
Job Number 2 (Job Creation):						
Lead Staff		2				
Service Technician/Installer		10				
		20				
		2				
Customer Service/Dispatch		4				
		4				
Corporate Support/Operations Staff		2				
Corporate Support/Operations Staff		6				

# **INTRODUCTION**

Founded in 2000 in Orange County, Service Champions, LLC (Service Champions) (<u>www.servicechampions.com</u>) specializes in installing, diagnosing, and repairing Heating, Ventilation and Air Conditioning (HVAC) systems. The Company was recently acquired by Odyssey Investment Partners (Parent Company), and Service Champions is including two new locations (Riverside and San Bernardino) in addition to its Orange County location. ETP training will be deliver at Service Champions' locations in Riverside, San Bernardino, and Orange counties.

## Veterans Program

Even though the Panel has established incentives for training California veterans, Service Champions is not requesting a Veteran Job Number in this proposal. The Company is active in recruiting veterans with organizations such as "Hire a Vet" and "Hire a Hero," and it participates in jobs fairs and outreach efforts to hire veterans. Service Champions will identify veterans via the ETP's enrollment processes for statistical information reporting purposes.

# PROJECT DETAILS

This will be Service Champions' third ETP Contract, and its third in the last five years. Training in Service Champions first ETP project focused on improving processes and new technologies. During that project Service Champions invested and trained staff in duct work and launched an insulation division. The most recent ETP project was focused on upskilling employees (due to increased-efficiency demands), new products, and installing a new ERP system.

In the proposed project, Service Champions is working to meet its rapidly growing industry needs and to stay competitive by upgrading and expanding its products and services as well as entering/expanding into new territories. The Company reports it has invested in a new watertreatment system called Halo Water Treatment Systems and has built substantial in-house practice labs where training is conducted. Even though some course titles in this curriculum are similar to those in prior proposals, the content in the courses have been updated.

# **Retrainee - Job Creation**

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

Service Champions is expanding business capacity by hiring new employees. The Company plans to hire 50 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. The Company's growth is attributed to expansion of facilities' equipment for new product lines and rising construction demands. Service Champions reports that it has grown from 215 to more than 450 full-time employees in the last three years.

According to the US Bureau of Labor Statistics, the HVAC industry is expected to grow by 14% over the next few years. Increasing business activity and consumer spending have benefitted business expansion plans and supported new construction. In addition, there is a growing focus on energy usage resulting in a higher demand for energy-efficient systems. The COVID-19 pandemic reportedly sparked renewed interest in sustainable technology and savings that can occur by using more efficient HVAC systems. This demand is also related to Title 20 and 24 California Code of Regulation requirements that include new efficiency standards. For instance, Title 24 California Code of Regulations required a 28% overall-energy savings (2016–2020)

leading to the development and implementation of emerging technologies to improve and reduce home-energy use.

# Training Plan

Training will be provided to all occupations via Class/Lab and E-Learning deliver methods in the following:

**Business Skills**: Writing Quotes, Residential Heating and Air Conditioning Industry Equipment (non-technicians), are needed to better assist customers.

**Commercial Skills**: Halo Water Purification System, Sustainability Concepts, Equipment Diagnostics/ Maintenance/ Management have been identified to respond to increased interest in energy savings and new equipment product offerings.

**Computer Skills**: 8x8 Phone System, Mobile Applications, Payment Card Certification. These skills are needed to upgrade workers skills due to new technology and to meet job duty expectations.

**Continuous Improvement**: Change Management Skills, Leadership Skills, Process Mapping/Improvement Skills, Project Management Skills and Root Cause Analysis. This training supports the plan to improve efficiency while delivering new products and services.

## **Green/Clean Operations**

As part of its Indoor Air Quality line of products and services, Service Champions offers products such as powered air filters, air scrubbers, and UV lights that filter harmful particles from the air. In addition, the Company is implementing new products that utilize green technology including: BioGuard Powered Filter which attaches to the bottom of a furnace and through an electrostatic field delivers cleaner air throughout a home; AirScrubber which treats and purifies air in a home ensuring that surfaces, countertops, furniture, etc. are cleaner; and, anti-microbial ducts which prevent mold and allergens.

# Commitment to Training

Service Champions currently spends \$1,000,000 annually on training in California which includes Sexual Harassment Prevention, New Hire Orientation, OSHA required training, and hydration on the job. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

Service Champions Vice President of Human Resources (dedicated administrator) will oversee the project with assistance from an Operations Administrator, HR Administrator, and Training Manager (per site) to ensure that training is scheduled and training rosters are tracked accordingly. The Company has also hired a third-party subcontractor, Training Funding Partners (TFP), to assist with the project's administration. Training will be provided by eight internal trainers who are subject-matter experts and by external-training vendors if needed.

### Impact/Outcome

ETP-funded training will help train an estimated 50 new employees responding to the Company's growth into new regions (Riverside and San Bernardino) and to support its new products/service lines, while leading to skill upgrades for both new and existing employees. ETP training is

anticipated to support new product sales and reinforce territory and service expansions, while also helping Service Champions meet efficiency and increased-productivity goals.

## Recordkeeping

Due to the COVID-19 pandemic, an Alternative Recordkeeping (ARK) method is being requested.

# PRIOR PROJECTS

The following table summarizes performance by Service Champions under an ETP Contract that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0223	Brea	10/1/18 – 12/30/20	\$304,200	\$304,200 (100%)
ET16-0368	Brea	2/29/16 – 2/28/18	\$462,380	\$462,380 (100%)

# DEVELOPMENT SERVICES

Service Champions retained TFP in Fountain Valley to assist with development of this proposal for a flat fee of \$23,500.

# ADMINISTRATIVE SERVICES

The Company also retained TFP to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

# TRAINING VENDORS

To Be Determined

# Exhibit B: Menu Curriculum

## Class/Lab/E-Learning Hours

8-200

Trainees may receive any of the following:

### **BUSINESS SKILLS**

- Business Processes & Procedures
- Client Service/Communication Skills
- Coordinating and Scheduling Service/Dispatching
- Equipment and Industry Overview
- Finance/Accounting Skills
- Logistics/Warehouse Skills
- Maintenance/Membership Programs
- Marketing/Sales Skills
- New/Upgraded Product Knowledge and Service Skills
- Residential Heating and Air Conditioning Industry/Equipment Overview (nontechnicians)
- Train-the-Trainer
- Writing Quotes/Financing

## **COMMERCIAL SKILLS**

- Electricity/Voltage & Schematics
- Equipment Diagnostics/Maintenance/Management
- Halo Water Purification System
- Maintaining Merchandise Inventory/Warehouse Skills
- Residential Cooling/Heating Equipment Installation/Maintenance Skills
- Residential Ducting/Equipment and Installations
- Residential Electrical/Plumbing Equipment Installation/Maintenance Skills
- Residential Indoor Air Quality and updated Technology
- Residential Smart Equipment Technology/Controls
- Sustainability Concepts and Skills
- System Troubleshooting

### **COMPUTER SKILLS**

- Call Center/Dispatch Application Skills
- Enterprise Resource Planning (ERP) System
- 8x8 Phone System
- Intermediate/Advanced Microsoft Office (Word, Excel, PowerPoint)
- Payment Card Certification
- Proprietary System/Technology Skills
- Mobile Applications

#### CONTINUOUS IMPROVEMENT SKILLS

- Change Management Skills
- Leadership Skills
- Problem Solving Skills
- Process Mapping/Process Improvement Skills
- Project Management Skills
- Root Cause Analysis and Remediation
- Time Management Skills

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.



**EXPANSION FUNDS** 

# **RETRAINEE - JOB CREATION**

# **Training Proposal for:**

# Simpson Strong-Tie Company, Inc.

# Contract Number: ET22-0171

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

# PROJECT PROFILE

Contract	Retrainee		Industry	Manufact	turing (E)	
Attributes:	Priority Rate		Sector(s):		3 ( )	
	Job Creation Initiative					
	Expansion Funds (Alt/Gen)					
	, ,					
				Priority Ir	ndustry: 🛛Yes 🔲No	
Counties Served:	Riverside		Repeat Contractor:	Yes No		
Union(s):	🛛 Yes 🗌 No	SMART Local	170, CWA L	ocal 9415		
Number of	Number of Employees in: CA: 450		U.S.: 1,500		Worldwide: 2,000	
Turnover Rate: 9%						
Managers/ (% of total tra	Supervisors: inees)	11%				

# **FUNDING DETAIL**

In-Kind Contribution \$260,000

Total ETP Funding	
\$249,941	

# TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours		Average Cost per Trainee	
No. No.		Trainees	Class / Lab	CBT			
1	Retrainee	Computer Skills,	201	8–200	0	\$1,081	\$19.12
	Priority Rate	riority Rate Continuous Impr, Manufacturing Skills, OSHA 10/30, PL-Manufacturing Skills		Weighte 47	•		
2	Retrainee	Computer Skills, Continuous Impr,	20	8-200	0	\$1,633	\$18.50
	Job Creation Manufacturing Skills, OSHA 10/30, PL-Manufacturing Skills			Weighte 71	d Avg:		

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: <u>Job Number 1:</u> \$19.12 per hour for Riverside County.
 Job Number 2: \$15.65 per hour for Riverside County.
 Health Benefits: ∑ Yes ∑ No This is employer share of cost for healthcare premium

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

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

Up to \$0.62 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
Job Number 1:						
		5				
Maintenance/Mechanic		9				
		15				
		36				
Production Staff		27				
		5				
Chippore		13				
Shippers		6				
		7				
Welders/Fabricators		21				
		2				
Engineering/IT		15				
Supervisers/Menergers		5				
Supervisors/Managers		18				
		5				
Customer Service		2				
		1				

Finance Staff	6
	3
Job Number 2: Job Creation	
Maintenance/Mechanic	1
Customer Service	3
Production Staff	4
	2
Shinners	4
Shippers	1
Welders/Fabricators	2
	3

# INTRODUCTION

Founded in 1956, Simpson Strong-Tie Company, Inc. (SST) (<u>www.strongtie.com</u>) is a subsidiary of Simpson Manufacturing Company, Inc. The Company creates structural products that help contractors build buildings. SST specializes in structural systems research and technology while being one of the largest suppliers of structural building products in the world. SST's Riverside facility is the sole manufacturer of the Company's Steel Strong Walls product set and is responsible for supplying all of its US market customers. This product is used in residential and commercial buildings. The Riverside facility is also the sole manufacturer of SST's Structural Steel Special Moment Frames (SMF) which is used to keep steel buildings strong and safe. The SMF product set is mainly used in steel framed commercial and multi-family buildings and is being engineered to expand into buildings 3–15 stories in height. ETP training will be delivered at its manufacturing facility in Riverside.

SST continues to build its partnership with top homebuilders, architects, engineers, and the construction supply chain throughout the country. HD Supply White Cap, Hub Construction Supply, Reno Hardware, Home Depot, and Lowe's are several of its largest customers. In addition, SST products are sold directly to general contractors, residential homebuilders, multi-family developers, and high-rise condo-tower developers.

# Veterans Program

Even though the Company is not requesting a separate Veteran's Job Number for ease of administration, SST is committed to hiring and retaining veterans as it posts job openings directly on Indeed.com's Indeed Military website to recruit veterans. In addition, SST is the lead sponsor of Habitat for Humanity's (HH) Habitat Strong program which is HH's national initiative to build homes for and provide volunteer and employment assistance to veterans and their families. Established in 2015, Habitat Strong is meant to help Habitat affiliates build disaster-resilient homes.

# PROJECT DETAILS

This will be SST's eighth ETP Contract, and its fourth in the last five years. Training in its last project was associated with an \$8M investment in welding robots, three automated presses, material handling conveyors/robots, paint line equipment, wall assembly conveyors and improved software systems used to operate this equipment and a new Enterprise Resource Planning System (SAP Software). In this proposal, training will focus around SST's products/services tied

to the roll out of its Links to Midrise Steel System which required an estimated \$8M investment over the last 18 months and includes new Computer Numerical Control (CNC) Coupling Machines that has helped SST to expand its product-line offerings.

## **Retrainee - Job Creation**

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

In this proposal, the Company plans to hire 20 new employees (Job Number 2) which are primarily Production Staff, Shippers, and Welders occupations. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

SST reports the existing facility has ample room for the newly hired employees and reports the expansion in facilities equipment for new product lines and rising construction demands are driving the Company's business-capacity growth. Additionally, SST's continued market-based demand growth and further estimated \$3M investment over the next 21-month period all support its planned new product and service offerings and help justify its new training plan outlined in this proposal as the Company continues to develop and engineer walls that are designed to reduce damages during disasters (flood, fire, earthquake, tornados, and high-wind storms). SST reports demand for its products are up 6% in contrast with this time last year and that the new products and challenges presented by the COVID-19 pandemic have led to decisions to hire and cross-train these 20 frontline staff to support the various product lines SST manufactures.

## Training Plan

Training will be delivered via Class/Lab, E-Learning, and Productive Lab (PL) in the following:

**Computer Skills**: Training will be offered to all occupations on course topics that include Five Axis Computer Numerical Control, Microsoft Software Applications (Intermediate / Advanced), and Ariba Network Advanced SAP. Training will allow workers to generate accurate and up-to-date reports and provide financial and operational visibility.

**Continuous Improvement**: Training will be offered to all occupations on course topics that include Lean Kaizen training to eliminate wasteful activities in SST's processes. Frontline workers will be empowered to make decisions and take immediate action, resulting in a greater attention to detail, reduction in scrap and rework, and enabling rapid response to customer requests.

**Manufacturing Skills**: Training will be offered to all occupations on course topics like New Mid Rise Steel Line Operation, Equipment Operation, Plant Operations, and Production Skills Technical on newly-acquired equipment and computerized modules to provide workers with knowledge and skills to operate SST's equipment in start-up/installation and operating standards.

# **Certified Safety Training**

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

# Productive Laboratory (PL-Manufacturing Skills)

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

SST requests PL- Manufacturing Skills training for approximately 70 trainees spanning across all of the proposed occupations on topics that include CNC Coupling, IBEAM, Media Blaster, Plasma Cutter, and Robotic Welder. The Company understands PL training is to bring the employee to a basic-proficiency level only and will be capped at 60 hours per trainee.

The customized services offered by SST has led the Company to develop an extensive training program using in-house equipment used by seasoned (internal) trainers who are subject-matter experts and/or machine-certified instructors. PL training will be specific to the type of equipment and/or process to ensure trainees receive a broader understanding of the entire manufacturing process. The PL portion of the training supports the classroom training, but the PL training is conducted on the line and helps the staff learn to apply what they learned in class on real jobs. To reduce production-line interruptions, the Company requests a 1:3 trainer-to-trainee for all PL training.

## Commitment to Training

SST spends \$75,000 on training annually per facility in California. Training includes new employee orientation, safety, health and environmental, management skills, basic-computer skills, anti-harassment training, and forklift 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

SST's Plant Manager (dedicated administrator) will oversee (overall) administration of the project. The Production Manager will execute the training plan and coordinate the training effort to ensure proper record-keeping procedures are in place. Training will be delivered by in-house trainers and vendors as needed. SST also retained an experienced third-party subcontractor, Training Grants Intelligence, Inc. (TGII), to assist with project administration.

### Impact/Outcome

With ETP funds, SST's proposed training will result in OSHA 10/30 and ISO 9001 certification while achieving cost savings performance goals though greater efficiency and faster times to delivery. The Company's employees will be cross-trained to maintain its production lines to keep pace with growing customer demands for SST's products and to remain competitive in a fast paced and changing construction industry by upskilling its workforce.

# Union Support

Six of the nine total occupations (Maintenance/Mechanic, Production Staff, Shippers, Welders/Fabricators, Engineers/IT and Supervisors) are represented by Local 170 (SMART Sheet Metal Air Rail Transportation) and/or by Communications Workers of America (CWA) AFL-CIO Local 9415. The unions have each submitted a letter of support for this training project.

# Recordkeeping

Due to the COVID-19 pandemic, an Alternative Recordkeeping (ARK) method is being requested.

# PRIOR PROJECTS

The following table summarizes Contractor's performances under ETP Contracts that were completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0446	Riverside	4/8/2019- 10/4/2021	\$339,315	\$184,113* (54%)
ET17-0391	Riverside	1/26/2017- 1/25/2019	\$141,930	\$139,647 (98%)
ET15-0326	Riverside	12/1/2014- 11/30/2016	\$162,000	\$162,000 (100%)

\*ET19-0446: SST has documented 14,077 eligible training hours with estimated earnings of 92% of the Contract's approved amount based on hours entered into ETP systems. However, payment earned to date is \$184,113.

# **DEVELOPMENT SERVICES**

SST retained TGII in Suwanee, Georgia to assist with development of this proposal at no charge.

# **ADMINISTRATIVE SERVICES**

The Company also retained TGII to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

# TRAINING VENDORS

To Be Determined

# Exhibit B: Menu Curriculum

## Class/Lab/E-Learning Hours

8–200

Trainees may receive any of the following:

# **COMPUTER SKILLS**

- Five-Axis Computer Numerical Control (CNC)
- Computer Aided Design (CAD)
- Computer Aided Engineering (CAE)
- Computer Aided Design And Drafting (CADD)
- Computer Aided Process Planning (CAPP)
- Computer Aided Tool Design (CATD)
- Computer Aided Manufacturing (CAM)
- Computer Aided Numerical Control (NC) Part Programming
- Computer Aided Line / Product Scheduling
- Computer Aided Material Requirement Planning
- Flexible Manufacturing System (FMS)
- Group Technology (GT)
- Computer Aided Testing (CAT)
- CAD/CAM (Computer Aided Design / Computer Aided Manufacturing)
- Ariba Network Advanced SAP
- Microsoft Software Applications (Intermediate / Advanced)
- Proprietary Reporting & Support Systems
- Server & Hardware Configurations

# **CONTINUOUS IMPROVEMENT**

- Continuous Improvement Techniques
- 4 Adopt Change
- Identify, Find Solutions
- **4** Take Ownership
- Communications
- Challenge and Target Goals
- Rendaneyi Model
- Overcome Obstacles
- Performance Deliveries
- Team Building
- Quality Concepts
- Frontline Decision Making & Problem Solving
- High Performance Workplace Systems
- Lean Six Sigma
- Best Practices
- 🜲 ISO 9001: 2008
- Business Strategies for Growth
- Customer Service Skills for Growth
- Leadership for Growth
- **4** Performance Management
- Sales & Marketing for Growth

# **MANUFACTURING SKILLS**

Advanced Techniques for New Products, Industries Clients & Processes

- CNC Coupling Machine
- Steel Strong Wall Panels
- Steel Strong Wall Prototype
- Blueprints Schematic Reading
- 4 Weld Cells
- Preventative Maintenance Production
- Robotic Welding Machines
- New Mid Rise Steel Line
- \rm IBEAM
- \rm Media Blaster
- Plasma Cutter
- High End Saw
- High End Steel
- Logistics
- 4 Safety
- Equipment Operation and Maintenance
- Design & Engineering
- **4** Maintenance Equipment
- Assembly Skills
- Warehouse Skills
- Production Skills
- Quality Control

OSHA 10/30 (OSHA-certified instructor required)

- OSHA 10 (maximum of 10 hours per trainee)
- **Gamma** OSHA 30 (maximum of 30 hours per trainee)

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

### Productive Lab (PL) Hours

0–60

## MANUFACTURING SKILLS (limited ratio 1:3)

- CNC Coupling Machine
- Steel Strong Wall Panels
- Steel Strong Wall Prototype
- Media Blaster
- 🖊 IBEAM
- Plasma Cutter
- High End Saw
- High End Steel
- Steel Strong Walls
- Paint Line
- Specials Moment Frames
- Manual Presses
- Welding Robots
- Auto Presses
- Auto Punch and Cut Press

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

9101 East Whittier Blvd., 2<sup>ee</sup> Floor Pico Rivera, California 90660-2405 **Phone: 562-695-4066 Fax: 562-695-4807** 



(8) THUSE LASER COUNCE IT

September 7, 2021

Employment Training Panel 1100 J Street Sacramento, CA 95814

Dear Panel Members,

We understand Simpson Strong tie is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: Qty 123 Production, Welding, Fabricating, Shipping, and Supervisors.

# <u>Exhibit E</u>

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

If you should have questions or concerns with regard to this letter of support, please contact our SMART Local Union 170 office at (562)695-4066.

Sincerely,

**Business Manager** 



Communications Workers of America AFL-CIO CWA Local 9415 1831 Park Boulevard Oakland CA 94606 Phone: (510) 834-9415 Fax: (510) 893-8275 www.cwa9415.org

Dear Panel Members,

We understand the Simpson Strong-Tie Riverside, CA is requesting ETP funding. The proposed training plan for the specified members has our support. The approximate number of trainees from the following occupations will be participating in this project: Qty: 45 Maintenance/Mechanics, Engineering/IT, Supervisors

# **EXHIBIT**

The Union with respective Local 9415 has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with ETP regulation 4404, the Notice of Intent contained the information regarding the proposed training, the impacted employee population, the labor organization opportunity to participate in the agreement's development, and the effective date of the application.

By way of this letter of support, the undersigned, as an authorized labor representative of the covered union workers during the period of training described above concurs with the proposal, inclusive of the specified training and the covered members in the training plan reviewed. Any restrictions to the support provided which are outside of the specifics of the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Thanks in Advance,

Decovan Rhem, President CWA Local 9415 510-759-9123 Drhem@cwa9415.org



# **EXPANSION FUNDS**

# **Retrainee-Job Creation**

# **Training Proposal for:**

# Keysight Technologies, Inc.

# Contract Number: ET22-0177

Panel Meeting of: November 19, 2021

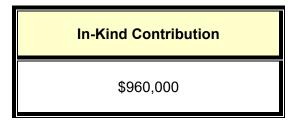
ETP Regional Office: Sacramento

Analyst: J. Fetsch

# PROJECT PROFILE

Contract Attributes:	Thomy Rate		Industry Sector(s):	Manufact	turing (E)
	Retrainee Job Creation Ini	tiative		Driority In	ndustry: 🛛Yes 🗌No
				FIIOLITY II	
Counties Served:	Placer, Santa C	lara, Sonoma	Repeat Contractor:	🛛 Yes	No
Union(s):	🗌 Yes 🛛 No				
Number of	Employees in:	CA: 3,000	U.S.: 4,500		Worldwide: 13,000
Turnover Rate: 6%		6%			
	Managers/Supervisors: (% of total trainees)				

# **FUNDING DETAIL**



Total ETP Funding	
\$494,500	

# TRAINING PLAN TABLE

Job	Job Description	Type of Training	Estimated No. of	Range of Hours		Average Cost per	Post- Retention		
No.		Type of Training	Trainees				CBT	Trainee	Wage*
1	Retrainee	Comm'l. Skills, Business Skills,	225	8-200	0-16	\$1,380	\$26.48		
	Priority Rate	Computer Skills, Cont. Imp., HazMat, Mfg. Skills		Weighte 60	•				
2	Job Creation	Comm'l. Skills,	100	8-200	0-16	\$1,840	\$25.86		
	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills		Weighte 80	•				

\*Post-Retention Wage is the Contractual wage

**Minimum Wage by County**: Job Number 1: \$19.12 per hour in Sonoma and Placer counties; \$20.86 per hour in Santa Clara County

Job Number 2(Job Creation): \$15.65 per hour in Sonoma and Placer counties; \$17.39 per hour in Santa Clara County

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

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

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

Wage Range by Occupation				
Occupation Titles	Actual Wage Range	Estimated # of Trainees		
Job Number 1 (Retrainee)				
Administrator		25		
Technician		50		
Engineer		130		
Manager		20		
Job Number 2 (Job Creation)				
Administrator		20		
Technician		20		
Engineer		50		
Manager		10		

# INTRODUCTION

Founded in 2014 and headquartered in Santa Rosa, Keysight Technologies, Inc. (Keysight) (<u>www.keysight.com</u>) is a global-technology company that produces and distributes hardware and software for electronic-measurement instruments. Products include oscilloscopes, analyzers, generators, meters, wireless technologies, network test and security, and design and test software. ETP-funded training will be conducted at the Company's headquarters in Santa Rosa and at its assembling facilities in Santa Clara and Roseville. This is Keysight's fourth ETP project, and it's fourth in the last five years

## Veterans Program

Even though Keysight does not plan to include a separate Veteran's Job Number, the Company has established an Affirmative Action Programs under the Vietnam Era Veteran's Readjustment Assistance Act of 1974 (VEVRAA). VEVRAA requires affirmative action to recruit, employ, and advance in employment, disabled veterans, recently separated veterans (i.e., within three years of discharge or release from active duty), active-duty wartime or campaign badge veterans, or Armed Forces service medal veterans. Keysight is committed to serving these individuals.

# PROJECT DETAILS

Prior training focused on continuous improvement initiatives to promote greater collaboration companywide. Training in this proposal will focus on product technology training for frontline technical and management staff involved in research, production, quality control and technology advancements. The development, design, and manufacture of all Keysight products is complex and requires a high degree of technical knowledge by employees. The proposed ETP-funded training is intended to foster a high level of innovation and product development, knowledge of critical IT systems, and to create a high-level of communication, professionalism, quality and ethics across the organization. All proposed training will provide trainees skillsets that are transferable throughout the electronic measurement industry. Keysight has also agreed to not enroll any employees who have been previously placed in an ETP Contract and confirmed that all proposed courses are new.

### **Retrainee - Job Creation**

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

Keysight's customer base is expanding and in order to meet new demands the Company will hire 100 new employees (Job Number 2) including Administrators, Technicians, Engineers, and Managers. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

# Training Plan

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

**Business Skills:** Training will be offered to all occupations for employees who currently lack the skills to successfully introduce new products. Product knowledge and marketing techniques training will be delivered to selected employees to better market the Company's advanced measurement instruments to its growing global customer base. Topics include Advanced Negotiation, Finance and Accounting, and Marketing.

**Commercial Skills**: Training will be offered to Engineers and Technicians and include technically complex and customized courses to serve the automotive, energy, and advanced wireless technology industry including 5G. Training is intended to foster a high level of innovation and product development which will fuel the creation of the next generation of electronic test measurement. Topics include AC Power Sources, Data Generators & Analyzers, and Dynamic Signal Analyzers – Materials Measurement.

**Computer Skills:** Training will be offered to all occupations and focus on advanced desktop applications and how to best utilize the Company's programs. Topics include Advanced Manufacturing Control Systems, Desktop Productivity Applications, and eBusiness Applications.

**Continuous Improvement** Training will be offered to all occupations and cover all aspects of quality improvement and customer relations. Topics include Leadership/Coaching Skills, Design for Excellence, and Design Tools and Practices.

**Hazardous Materials**: Training will be provided to Technicians and Engineers and focus on safely handling hazardous materials and risk management to ensure proper use, transport, or disposal of hazardous substances used in all operations. Topics include Chemical Hazards Communication Standards, and Hazardous Materials Labeling, Handling, Safe Transport and Clean-up.

**Manufacturing Skills:** Training will be offered to Technicians and Engineers and focus on manufacturing processes and cross-training to allow them to operate multiple machinery on the production floor. Topics include Assembly, Set-up, Inspection and Best Use Practice and Equipment Cross Training.

# Computer-Based Training (CBT)

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees will receive between 0-16 hours of CBT.

# Commitment to Training

The Company's statewide training expenditure in California is in excess of \$1,250,000. Keysight funds all orientation and basic job skills training; class/lab and on-the-job manufacturing skills training for new employees; OSHA-mandated safety regulations; basic computer training; executive training; and training in compliance, human resources, and legal issues. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### > Training Infrastructure

The Director of Employee and Management Development will have overall responsibility for the ETP project. Management staff will be assigned to meet with ETP staff and administer the project. Keysight will utilize staff in its internal training department for scheduling, coordination, and use of the LMS to document training. In addition, Keysight will contract with an administrative contractor. Training will be delivered by in-house experts and vendors as needed.

### Electronic Recordkeeping/LMS

Staff has reviewed and approved the Company's Learning Management System.

# ACTIVE PROJECTS

The following table summarizes Contractor's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET21-0171	\$200,000	10/5/20-10/4/22	100	113	0
ET20-0309	\$460,000	5/28/20-5/27/22	500	2311	0

**ET21-0171:** Based on ETP Systems, 452 reimbursable hours have been tracked for potential earnings of \$200,000 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to and in progress through July 2022.

**ET20-0309**: Based on ETP Systems, 39,075 reimbursable hours have been tracked for potential earnings of \$460,000 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to and in progress through February 2022.

# PRIOR PROJECTS

The following table summarizes Contractor's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET17-0231	Santa Rosa, Roseville, Santa Clara	10/3/16 – 10/2/18	\$432,000	\$174,927 (41%)

Destruction of hardcopy training attendance records in the Tubbs Fire was a major compliance issue. In addition, disruption to normal business operations severely impacted the Company's ability to deliver ETP-funded training courses.

# **DEVELOPMENT SERVICES**

Herrera & Company in Stockton assisted with development for a flat fee of \$8,750.

# ADMINISTRATIVE SERVICES

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

# TRAINING VENDORS

To Be Determined

# Exhibit B: Menu Curriculum

## Class/Lab/E-Learning/Videoconference Hours

8-200 Trainees may receive any of the following:

## **BUSINESS SKILLS**

- Advanced Negotiation
- Finance and Accounting
- Marketing

# **COMMERCIAL SKILLS**

- AC Power Analyzers
- AC Power Sources
- Application-Specific Test Systems & Components
- Arbitrary Waveform Generators
- Bit Error Ratio Testers
- Cloud Security Test
- Data Acquisition DAQ
- Data Generators & Analyzers
- DC Electronic Loads
- Digital Multimeters
- Dynamic Signal Analyzers Materials Measurement
- EMI & EMC Measurements, Phase Noise, Physical Layer Test Systems

# **COMPUTER SKILLS**

- Advanced Manufacturing Control Systems
- Business System Processing
- Desktop Productivity Applications
- eBusiness Applications

# **CONTINUOUS IMPROVEMENT**

- Advanced Product Quality and Reliability
- Design Tools and Practices
- Design for Excellence
- Leadership / Coaching Skills

# **HAZARDOUS MATERIALS**

- Chemical Hazards Communication Standards
- Hazardous Materials Labeling, Handling, Safe Transport, and Clean Up
- Restricting of Hazardous Substances

### MANUFACTURING SKILLS

- Assembly, Set-up, Inspection and Best Use Practices
- Equipment Cross-Training
- Equipment Technical Qualifications and Certifications
- Lean Manufacturing Techniques
- Testing and Troubleshooting

## **CBT Hours**

0-16 Trainees may receive any of the following:

## COMPUTER SKILLS

- Advanced Project Management Software (8 Hours)
- Computer Assisted Design (4.5 Hours)
- Database Design (6 Hours)
- Electronic Record Management (30 Minutes)
- Manufacturing Resources Planning (1.5 Hours)
- Management and Manufacturing Control Systems
  - Enterprise Resource Planning (ERP) Essentials (2 Hours)
    - ERP Materials Management (2 Hours)
    - ERP Financial Basics (2 Hours)
    - ERP Production Planning (2 Hours)
    - ERP Sales and Distribution (2 Hours)
    - ERP Materials Requirement Planning (2 Hours)
    - ERP Business Rule Framework (2 Hours)
    - ERP Fundamentals for Planning (2 Hours)

## **CONTINUOUS IMPROVEMENT**

- Advanced Customer Communications and Awareness (1 Hour)
- Leadership/Coaching Skills (2.5 Hours)
- Marketing Promotion and Strategy (6 Hours)
- Multi-Cultural Customer Service Relationships (2 Hours)
  - Problem Solving Tools and Techniques
    - Creative Approach to Problem Solving (3 Hours)
    - Problem Solving Techniques (3 Hours)
    - The Five Step Creative Process (3 Hours)
    - Problem Solving for Continuous Improvement (3 Hours)
- Process Improvement Training
  - Process Improvement Foundations (2 Hours)
  - Simplifying Business Processes (2 Hours)
  - Six Sigma Foundations (2 Hours)
  - Implementing Continuous Improvement (2 Hours)
  - Collaboration Principles and Process (2 Hours)
- Product Marketing for Engineers (3 Hours)
- Technical Presentation Skills (7 Hours)

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.



## **EXPANSION FUNDS**

## **Training Proposal for:**

# **Employed Security Service Center, Inc.**

## Contract Number: ET22-0135

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: M. Niquet

### PROJECT PROFILE

Contract Attributes:	New Hire	Industry Sector(s):	MEC (H)	
Allibules.	Veterans	Seciol(S).	Services(G)	
	Expansion Funds (Atl/Gen)			
			Priority Industry: 🗌 Yes 🛛 No	
Counties	Statewide	Repeat		
Served:		Contractor:	🗌 Yes 🛛 No	
Union(s):	☐ Yes ⊠ No			
Turnover Rate:		≤20%		
Managers/Supervisors: (% of total trainees)		N/A		

## FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$232,300		\$37,100 20%		\$269,400
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 Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	New Hire Veterans	Comm'l. Skills, Continuous Imp., Job Readiness Skills	103	8-260 Weightee 10 <sup>2</sup>	-	\$2,323	\$16.48

#### \*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: <u>Job Number 1</u> (New Hire) \$16.48 per hour for Los Angeles
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 of up to \$0.23 per hour to meet the Post-
Retention Wage in Job Number 1.

Wage Range by Occupation							
Occupation Titles	Actual Wage Range	Estimated # of Trainees					
Logistics Professional		10					
Logistics Warehouse Technician		5					
		5					
		40					
Private Security Officer		30					
		10					

#### **INTRODUCTION**

Founded in 2010, Employed Security Service Center, Inc. (Employed Security) (<u>www.employedsecurity.org</u>) specializes in training Security Officers and Logistics Professionals for private and public companies, government agencies, and workforce organizations across the state of California.

Employed Security has established relationships with select employers, who are eager to provide Veterans with job opportunities. Employed Security is certified by the Bureau for Private and Post-Secondary Education (BPPE). This is Employed Security's first ETP Contract.

#### Veterans Program

This project will specifically focus on the Veteran population. Trainee participants in this project may include transitioning active duty Veterans who are within one year of their anticipated separation date from service.

Employed Security works directly and specially with Veteran organizations such as Work Source Centers, the Los Angeles and Long Beach Veterans Administration, the Long Beach Department of Rehabilitation, the Housing Authority of the City of Los Angeles, the Department of Social Services, Community Career Development, the South Bay Workforce Development Board, National Veterans Transition Services, Inc., and local public workforce entities to identify Veterans that are looking for security and logistics opportunities.

The Panel has established incentives for training Veterans:

- > Support Costs are 20% for Veterans to encourage focused outreach.
- At least 50% of total training must consist of vocational skills training. The remaining hours may consist of literacy training, as an exception to the standard 45% limitation.
- Retention for Veterans may be satisfied by employment of at least 30 hours a week (instead of the standard 35) for at least 90 consecutive days. For occupations in which it is not customary to be employed 90 consecutive days, retention may be satisfied by employment of at least 500 hours within 272 days (the longest time period permitted by statute).

#### PROJECT DETAILS

Employed Security serves industries that provides security and logistical services. Due to the pandemic and recent civil unrest, these particular industries are experiencing the need to secure their facilities more closely. Additionally, employers have seen their supply chain interrupted by workers being unable to work due to Covid illness. This has created a need to improve distribution logistics that will improve delivery times and reduce delivery errors. Hence, the need for skilled workers is constantly increasing. As demand grows, so must the skilled workers available to fill the demand. Further, as an underrepresented population in the work force, Veterans need the requisite training to enter security and logistical services industries. Employers are struggling to find candidates for their high-skill jobs leading to high-wage pathways. Employed Security is providing the training to meet the current demands of employers within the job market.

Under this training program, Veterans looking to obtain careers in the Security and Logistics fields receive targeted training by Employed Security and are then placed into small and large employers. Typical security personnel placements are with agencies such as Absolute Security International, AGS Protect, Inc., Allied Universal, Black Knight Patrol, Diversified Protective Services, and RMI International. Logistics Professionals and Logistics Warehouse Technicians are placed with companies such as Amazon, Target, and other large distribution centers.

Employed Security has received commitments from at least 10 employers to hire the proposed 100 trainees upon completion of training.

#### Training Plan

Training will be provided to unemployed workers who will be placed in the aforementioned industries.

Training will be provided via class/lab and E-Learning at Employed Security's designated training locations located in Los Angeles County and in the following types of training respective to employer/industry workforce needs:

**Commercial Skills:** Training will be offered to all occupations which will be customized to meet the individual needs of each business. Training will include Baton Training, Chemical Agents, Close Protection, Firearms, Guard Card, Preliminary Assessments, Quality Control Systems, Standard Operating Procedures, Supply Chain Skills, and Team Building. This training will provide trainees skills needed to protect commercial and personal property as well as to improve delivery time and reduce delivery errors.

**Continuous Improvement**: Training will be offered to all occupations as needed. Skills to be learned include Leadership, Team Building as well as Covid 19 changing requirements and Disease Transmission Prevention.

**Job Readiness Skills**: Training will be offered to all trainees to meet the quality standards set by potential employers and provide individuals with the skills needed for trainees to find jobs, including interview and resume skills as well as communications and Customer Services Skills. Job Readiness Skills will not exceed 50% of the trainee's total training hours.

#### **Curriculum Development**

The core curriculum in this proposal was developed by Employed Security and specified by City and State agencies with access to regional data on industry trends that help keep the subject matter current. A structured training program provides veterans with necessary skills to enter the workforce and improves their opportunities for advancement in high wage, secure jobs.

The Security and Logistical curriculums consists of over 26 courses ranging from 4 to 112 hours of various courses and certifications. The Curriculum is regularly reviewed by Employed Security's Executive Director to ensure training is comprehensive and incorporates current methods and standards.

After the completion of training, students will complete a survey to evaluate their training experience and the applicability of training to their current jobs. Their employers are also given the opportunity to provide feedback. This feedback will assist Employed Security in improving the curriculum to meet the needs of its Participating Employers, resulting in suitable placement of its trainees at the end of the training program.

#### **Trainer Qualifications**

All trainers are Employed Security instructors with a minimum of 2 years of experience in their area of expertise and have been identified as subject-matter experts. These designated trainers go through a vetting/screening interview to determine eligibility for training.

#### Impact/Outcome

Security trainees will receive Baton, Chemical Agent, Firearm, and Guard Card certifications. Logistics Professionals and Logistics Warehouse Technicians receive certificates of completion. Because the training is customized based on an Employer's specific needs, the main objective is to provide trainees with the skills necessary to sustain a secure job in the workforce.

Retention Modification

The Panel may modify the retention period for these trainees to 500 hours within 272 days with one or more participating employers. This retention would assist with future placement of trainees with employers after training is complete with Employed Security. Employed Security respectfully requests this modification.

#### Marketing and Support Costs

Employed Security is requesting 20% support costs for this proposal to cover the cost of recruitment, assessing employer-specific job training requirements, training and placement of Veteran New Hires as proposed. Assessment activities and employer recruitment will continue to take place throughout the duration of the contract. Staff recommends approval of 20% for support costs.

#### 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

The CEO of Employed Security and an administrative assistant will be responsible for overseeing this project. In addition, the Company has hired an administrative subcontractor to provide ETP administrative support.

#### Recordkeeping

Employed Security would like to request and utilize alternative recordkeeping practices for training not conducted onsite as permitted by ETP's response to COVID-19

#### **Tuition Reimbursement**

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

#### **DEVELOPMENT SERVICES**

Employed Security retained National Training Company, Inc. (NTCI) in Irvine to assist with development of this proposal for a flat fee of \$15,000.

#### **ADMINISTRATIVE SERVICES**

Employed Security also retained NTCI to 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/E-Learning Hours

8 - 260

Trainees may receive any of the following:

#### **COMMERCIAL SKILLS**

- Automated External Defibrillator
- Baton Training
- Cardiopulmonary Resuscitation
- Chemical Agents
- Close Protection
- Execution and Control of Operations
- Firearms
- Guard Card
- Physical Security
- Preliminary Assessments
- Private Security
- Protective Intelligence Sourcing & Analysis
- Protective Operations
- Protective Perimeter
- Quality Control Systems
- Security & Protection Services
- Standard Operating Procedures
- Standards of Care
- Supply Chain
- Surveillance Detection Concepts
- Warehouse Procedures

#### CONTINUOUS IMPROVEMENT

- Leadership Skills
- Team Building
- Covid 19 Requirements
- Disease Transmission Prevention

#### JOB READINESS TRAINING

- Resume Writing
- Interview Preparation
- Communication Skills
- Customer Service

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

Note: Reimbursement for new hire training is capped at 260 total training hours per trainee.



# LIST OF PROPOSALS $\leq$ \$75,000 APPROVED BY DELEGATION ORDER FOR 09/21/21 - 11/08/21

Project

Approved Approved Date Amount

ET22-0162	Bivar, Inc.	11/05/21	\$33,810
ET22-0163	DeHart Plumbing, Heating, & Air, Inc.	11/05/21	\$40,250
ET22-0150	Delphon Holdings, Inc.	11/05/21	\$52,440
ET22-0133	Gradelink Corp	10/13/21	\$38,180
ET22-0137	National Veterans Chamber of Commerce	10/21/21	\$74,800
ET22-0139	O'Neil Digital Solutions, LLC	10/21/21	\$55,200
ET22-0142	W C Heating & Air Conditioning, Inc. dba We Care	10/18/21	\$65,550

Total -----\$360,230



## EXPANSION FUNDS Training Proposal for:

# Bivar, Inc.

# Delegation < \$75,000 Single Employer

## Contract Number: ET22-0162

Approval Date: November 4, 2021

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: A. Salinas

## PROJECT PROFILE

Contract	Retrainee		Indu	istry	Manufacturin	iq (E)	
Attributes:	SB <100		Sect	or(s):		5()	
	Priority Rate						
	Expansion Funds (Alt/Ge	en)					
					Priority Indus	stry: ⊠Yes  □No	
Counties Served:	Orange		Repea Contra		🗌 Yes 🛛 No		
Union(s):	🗌 Yes 🛛 No						
Number of Employees in:		CA: 38		U.S.:	38	Worldwide: 38	
Turnover Rate:		12%	2%				
Managers/Supervisors: (% of total trainees)14		14%					
	In-Kind Contribution						

\$81,335

Total	ETP Funding
	\$33,810

Small Business Only:	Owner 🗆 Yes 🗵 No			
	Contract Term 🛛 One Year 🗵 Two Year			
Occupations to be Trained:	Engineering/Technology Staff, Quality Assuranc Staff, Sales/Marketing Staff, Supply Chain Staf Corporate Support Staff, Managers			

### **TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee SB<100 Priority	Business Skills, Computer Skills, Cont. Imp., PL-Mfg. Skills, PL-Computer Skills	35	8–200 Weighter 42	•	\$966	\$19.12

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: \$19.12 per hour for Orange County

Health Benefits: Used to meet the Post-Retention Wage?: ⊠ Yes □ No

Up to \$1.12 per hour may be used to meet the Post-Retention Wage.

## **OVERVIEW**

Year Company Founded:	1965	<b>Company Headquarters:</b> Single location Irvine, CA
Facility location where training will occur		Irvine (Orange County)

Nature of Business:	<ul> <li>Bivar, Inc. (Bivar) manufactures LED indication and lighting products for application in audio/video, communication, industrial, medical, security and transportation industries.</li> <li>Offers LED linear lighting, single point lighting, and</li> </ul>
	<ul> <li>Chers LED intear lighting, single point lighting, and accessories.</li> <li>LED mounts and holders, LEDs, light pipes, and LED assemblies.</li> </ul>
	<ul> <li>Printed circuit board hardware and card guides</li> <li>Provision of project evaluation, power management, light engine solutions, thermal design, and fixture and optic techniques and materials.</li> </ul>

Customer Base:	• A network of manufacturer representatives and authorized distributors (such as Marl International).
Business / Industry Needs / Changes	<ul> <li>The electronics-manufacturing services' market is expected to grow by \$118.49 billion during 2020-2024 (according to a market research report by Technavio, which is a global-tech research and advisory company).</li> <li>Original equipment manufacturers are increasingly integrating advanced-electronic components into electronic devices due to the growing use of smartmanufacturing technologies and processes.</li> <li>Increasing adoption of smart manufacturing will boost the growth of the electronics-manufacturing services market as expected through the forecasted time period.</li> </ul>

## Training Plan:

Need for Training	
Need for Training:	<ul> <li>Bivar recently implemented a new Enterprise Resource Planning system called NetSuite. This new system will reduce manual processes by up to 70% by utilizing a single back-office system for processing financials, production fulfillment, inventory, and sales. Additionally, it will give the Company increased visibility into its financials using real-time dashboards and key-performance indicators.</li> <li>Bivar is planning to implement a new product information management software called Akeneo. This new system will provide a single place to collect, manage, and enrich its product information to create a product catalog, and then distribute it (the catalog) to its sales and eCommerce channels. This solution makes creating and delivering compelling product experiences faster and easier to enrich the customer experience across all sales' channels.</li> <li>Bivar implemented a product data management software called Solidworks Product Data Management Professional in the second half of 2021. This new system allows Bivar to manage data files and documentation, while maximizing productivity and improving product quality. This system enables the staff to securely store and index design data to facilitate streamlined data retrieval, improved version control, reduced data loss, and create the opportunity for collaboration on designs to reach multiple locations.</li> </ul>
	With ETP funds, Bivar plans to implement its new research and development initiatives for smart-
	technology devices and new product development.

Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

⊠ Class/lab

E-Learning

Productive Lab

Continuous Improvement	Business Skills	Computer Skills
PL-Computer Skills	PL-Mfg. Skills	

Productive Laboratory	Justification:         ⊠ New Equipment/Software         ⊠ New Production Procedures         □ Certification Standards         0-60 PL Hours per-trainee         Occupations Receiving PL Training:         Engineering/Technology Staff, Quality Assurance Staff,         Supply Chain Staff, Sales/Marketing Staff, and Corporate         Support Staff	
The PL instructor must be dedicated to t	raining, at a ratio of 1:2.	
Ratio Higher than 1:1	Production (and/or production process) requires no more tha a two-person team of workers.	

The following Modification(s) fall within Panel guidelines:

#### Temp-to-Perm

Temp-to-Perm	Bivar may hire individuals through a temporary agency and train them before hiring them full-time. It is estimated that approximately five trainees may be trained while employed by the temporary agency. If hired, Bivar would like to count these trainees towards placements and agrees not to bill ETP for any funding until the trainee is hired and retained on the job for 90-consecutive days. No progress payments will be taken on temp-to-perm trainees.
Average days to convert temporary workers to full time permanent employment.	90 days (3 months)
Employer-paid healthcare premiums while on temporary status.	☐ Yes ⊠ No It is expected that these workers will receive employer-paid health benefits immediately upon hire.

## Training Infrastructure & Administrative Plan

#### • Project Oversight:

The Director of Organizational Development (dedicated administrator) will oversee the project, and has identified one staff who will assist with (internal) administrative duties and who will be meeting with ETP staff. The Company has a training team that is ready to begin delivering training under the ETP contract as soon as approved. Bivar also hired a third-party subcontractor to assist with ETP administration and to manage the overall ETP Contract.

#### • Trainers:

In-house – Types of Training: Business Skills, Computer Skills, Continuous Improvement.
 Vendor – Types of Training by vendor: To Be Determined

### • Administration:

The Company has hired an experienced third-party administrator to manage the ETP administration tasks during the term of the Contract.

□ In-house

⊠ Subcontractor

### SUBCONTRACTORS

Subcontractor Type	Subcontractor Name	City	Cost / %
Development	Training Funding Partners	Huntington Beach	\$2,366
Administrative	Training Funding Partners	Huntington Beach	13% of payment earned
Training Vendors	To Be Determined	To Be Determined	To Be Determined

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8–200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Business Acumen
- Business Process Skills
- Communication Skills
- Finance/Accounting Skills
- Marketing Skills
- New Process Training
- New Product Technical Training
- Presentation Skills
- Sales Skills

#### **COMPUTER SKILLS**

- Intermediate/Advanced Microsoft Office
- NetSuite System Skills
- Product Information Management Software Skills
- Software/Hardware Skills
- Solidworks System Skills

#### **CONTINUOUS IMPROVEMENT**

- Change Management
- Engineering/Product Design Skills
- ISO 9001/14001 Skills
- Leadership Skills
- Lean Manufacturing Skills
- Problem Solving Skills
- Process/Performance Improvement Skills
- Process/Performance Management Skills
- Project/Program Management Skills
- Quality Assurance/Quality Control
- Root Cause Analysis
- Six Sigma
- Team Building Skills
- Troubleshooting

Productive Lab Hours (1:2 Ratio)

0–60

#### COMPUTER SKILLS

- NetSuite System (ERP)
- Solidworks System (Product Data Management)

#### MANUFACTURING SKILLS

- 3D Printers
- Cutting Presses
- CNC Machine
- Drill Press

- Pad Printer
- Pinning Machine
- Diss-O-Pads Product Machine

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



**EXPANSION FUNDS** 

## **Training Proposal for:**

# DeHart Plumbing, Heating, & Air, Inc.

# Delegation < \$75,000 Single Employer

## Contract Number: ET22-0163

Approval Date: November 5, 2021

Panel Meeting of: November 19, 2021

ETP Regional Office: San Francisco Bay Area

Analyst: S. Wang

### PROJECT PROFILE

Contract	Retrainee		Indu	istry	Construction	(C)
Attributes:	Priority Rate		Sect	or(s):		
	SB <100					
	Expansion Funds (Alt/Ge	en)				
					Priority Indus	stry: ⊠Yes  □No
Counties Served:	Stanislaus		Repea Contra		🗌 Yes 🛛 No	
Union(s): 🗌 Yes 🖾 No						
Number of	Number of Employees in: CA:		65	U.S.:	65	Worldwide: 65
Turnover Rate: 39		3%				
Managers/Supervisors: 0%		0%				
			_			

In-Kind Contribution

\$52,500

Total	ETP Funding
	\$40,250

Small Business Only:	Owner □ Yes ⊠ No		
	Contract Term 🛛 One Year 🛛 Two Year		
Occupations to be Trained:	Customer Service Staff, Service Technicians / Installers, Support / Operations Staff		

## TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Rang Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Priority SB<100	Business Skills Comm Skills Computer Skills Continuous Impr. OSHA 10/30	35	8–200 Weighte 50	•	\$1,150	\$19.12

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Stanislaus County (All Other Counties): \$19.12 per hour.
Health Benefits: Used to meet the Post-Retention Wage?: ⊠ Yes □ No
Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Stanislaus County.

### **OVERVIEW**

Year Company Founded:	1946	<ul> <li>Company Headquarters: Single location</li> <li>Modesto, CA</li> </ul>		
Facility location(s will occur	) where tr	aining	٠	Modesto (Stanislaus County)

Nature of Business:	•	Installs, services, and maintains a wide variety of air conditioning, plumbing, heating, and (indoor) air- quality products including thermostats, furnaces, heat pumps, duct works, and insulations.
Customer Base:	•	DeHart Plumbing, Heating, & Air, Inc. (DeHart) serves residential homes and businesses in North Stanislaus and South San Joaquin counties.

Business / Industry Needs / Changes• Address climate change through HVAC systems in residential homes, to increase energy efficiency.
---

### Training Plan:

Need for Training:	• To enable DeHart to continue with its workforce growth trajectory and meet the increase in customer demand, the Company will implement the following
	new products and systems that require training to its staff:
	<ul> <li>Halo5 – a water purification system that provides nutrient-enriched drinking water into its customer's homes.</li> </ul>
	<ul> <li>Navien and Rinnai – an on-demand water-heating product.</li> </ul>
	• PureAir from Healthy Climate, the iWave, and Air Scrubber – these three products clean air from debris, allergens, and viruses while creating a healthier environment for its customers.
	<ul> <li>SuccessWare – an all-encompassing software application with fully integrated back-office software and mobile applications to meet the needs of companies in the home-service industry while in the field.</li> </ul>

Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

Continuous Improvement		OHSA 10	0/30	
Business Skills		Comput	er Skills	Commercial Skills
	□ MS Pr	eceptor	☐ MS Didactic	
🛛 Class/lab	🛛 E-Lear	rning	🖾 CBT	Productive Lab

Certified Safety Training	⊠ OSHA 10/30

### **Training Hours**

☑ Weighted Average Hours over 45	50 Hours

DeHart is a small business that will train staff in several new products and a new back-office system. These platforms will help meet customer demands for both its frontline workforce's production and operation efficiency. The new system SucessWare has multiple modules. DeHart intends to implement ongoing modifications to the individual modules to maximize its use of the entire software suite. Learning the full implementation of SuccessWare will require approximately 24-32 hours of training per trainee, depending on job role, for staff to have competent understanding and the ability to utilize and manage the system. Training in other job specific skills will be needed to enable staff to understand the functionality of the new products described herein. DeHart's training plan may also incorporate new products during the term of the proposed ETP Contract. This training, along with supplemental CBT courses, will require an average of 50 hours of training per trainee.

The following Modification(s) fall within Panel guidelines:

#### Veterans Program

Number of Veterans	While the Company currently does not have any targeted outreach to the veteran's population, it is interested in looking
	into how it can expand its recruiting processes to include veteran-specific outreach.

#### Training Infrastructure & Administrative Plan

#### • Project Oversight:

DeHart's President/CEO (dedicated administer) will oversee the proposal. The Company's Director of People and Culture will also assist in providing (internal) administrative duties. DeHart also has approximately seven (in-house) trainers who will deliver training and who will assist in expanding its internal-training capabilities.

#### • Trainers:

☑ In-house – Types of Training: Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, and OSHA 10/30.

 $\boxtimes$  Vendor – Types of Training by vendor: To Be Determined (TBD).

#### • Administration:

Along with the Company's Director of People and Culture to assist with internal administrative duties, DeHart has also retained a third-party subcontractor- Training Funding Partners (TFP) to assist with the ETP administrative requirements and with communicating with ETP staff.

⊠ In-house

Subcontractor

#### **SUBCONTRACTORS**

Subcontractor Type	Subcontractor Name	City	Cost / %
Development	Training Funding Partners	Huntington Beach	\$3,200
Administrative	Training Funding Partners	Huntington Beach	13%

Training Vendors To Be Determined (TBD)
---

#### Exhibit B: Menu Curriculum

#### Class/Lab/E-Learning Hours

8–200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Business Processes & Procedures
- Client Service / Communication Skills
- Coordinating and Scheduling Service / Dispatching
- Equipment and Industry Overview
- Logistics / Warehouse Skills
- Maintenance Programs
- New / Upgraded Product Knowledge and Service Skills
- Residential Heating and Air Conditioning Industry / Equipment Overview (Non-Technicians)
- Train-the-Trainer

#### **COMMERCIAL SKILLS**

- Electricity / Voltage & Schematics
- Equipment Diagnostics / Maintenance
- Cooling / Heating Equipment Installation / Maintenance Skills
- Ducting / Equipment and Installations
- Electrical / Plumbing Equipment Installation / Maintenance Skills
- Indoor Air Quality and Updated Technology
- Smart Equipment Technology / Controls
- Sustainability Concepts and Skills
- System Troubleshooting

#### COMPUTER SKILLS

- Call Center / Dispatch Application Skills
- Intermediate / Advanced Microsoft Office (Word, Excel, PowerPoint)
- Proprietary System / Technology Skills
- SuccessWare System Skills
- Tablet Computer Applications

#### **CONTINUOUS IMPROVEMENT**

- Change Management Skills
- Leadership Skills
- Problem Solving Skills
- Process Improvement Skills
- Project Management Skills
- Root Cause Analysis and Remediation
- Time Management Skills

#### OSHA 10/30 (OSHA-Certified Instructor) 1:40 Ratio

- OSHA 10 (maximum of 10 hours per trainee)
- OSHA 30 (maximum of 30 hours per trainee)

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

#### CBT Hours

0–153

#### COMMERCIAL SKILLS

- AC Motor Lab (2 hours)
- Airflow Testing Procedures (2 hours)
- Basic HAVC Tools (3 hours)
- Basic Plumbing Tools (2 hours)
- Caulking and Sealing (2 hours)
- Charging: Subcooling and Superheat (2 hours)
- Charging: Tools and Rules (2 hours)
- Commercial A/C Troubleshooting (6 hours)
- Compressor Starting Relays and Capacitors (2 hours)
- Compressors (2 hours)
- Contactors and Motor Starters (1 hour)
- Diagnosing A/C Systems (3 hours)
- Diagnosing Compressor Problems (1 hour)
- Drain Cleaning Overview (2 hours)
- Drain Cleaning Procedures (5 hours)
- Drains (1 hour)
- Electric Furnace Troubleshooting (4 hours)
- Electric Water Heater Operation (1 hour)
- Electric Water Heater Troubleshooting (5 hours)
- Evaporators and Condensers (2 hours)
- Fittings and Valves (1 hour)
- Fundamental Electrical Concepts (2 hours)
- Gas Furnace Troubleshooting (6 hours)
- Gas Rooftop Refrigeration Troubleshooting (2 hours)
- Gas Water Heater Operation (2 hours)
- Gas Water Heater Troubleshooting (6 hours)
- Hangers and Supports (1 hour)
- Heat Pump Troubleshooting (8 hours)
- How To Use a Multimeter (2 hours)
- HVAC Ducting and Airflow (1 hour)
- HVAC Maintenance (2 hours)
- HVAC Motors (1 hour)
- HVAC Safety Basics (1 hour)
- HVAC Supplies (1 hour)
- HVAC Technicians (1 hour)
- Intro to Chillers (1 hour)
- Into to Heat Pumps (1 hour)

- Intro to Refrigeration Systems (2 hours)
- Intro to Water Heaters (3 hours)
- Kitchane Sink Troubleshooting (2 hours)
- Leak Check and Evacuation (2 hours)
- Leak, Evacuation, and Charging (2 hours)
- Lockout / Tagout (1 hour)
- Metering Devices (2 hours)
- Meters, Switches, Loads, and Circuits (2 hours)
- Pipe Repair Procedures Cast Iron Piping (3 hours)
- Pipe Repair Procedures Metallic Piping (4 hours)
- Pipe Repair Procedures Plastic Piping (3 hours)
- Plastic Joining Methods (2 hours)
- Plumbing Code Overview (2 hours)
- Plumbing Demolition (1 hour)
- Plumbing Fixtures Installation (1 hour)
- Plumbing Fixtures Overview (3 hours)
- Plumbing Maintenance (2 hours)
- Plumbing Materials Overview (2 hours)
- Plumbing Safety (2 hours)
- Refrigeration System Accessories (1 hour)
- Residential A/C Troubleshooting (5 hours)
- Rooftop Unit Troubleshooting (4 hours)
- Symbols and Wiring Diagrams (2 hours)
- Temperature, Pressure, and Heat (2 hours)
- Thermostats and Heating Controls (2 hours)
- Toilet Troubleshooting and Replacement (2 hours)
- Troubleshooting Motors (2 hours)
- Tubular and Fixture Trim (1 hour)
- Water Heater Maintenance (1 hour)
- Water Treatment and Well Systems (1 hour)

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



**EXPANSION FUNDS** 

## **Training Proposal for:**

# **Delphon Holdings, Inc.**

# Delegation < \$75,000 Single Employer

## Contract Number: ET22-0150

Approval Date: November 8, 2021

Panel Meeting of: November 19, 2021

ETP Regional Office: PPU-Central Office

Analyst: C. Hoyt

## PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Priority Rate Retrainee			istry or(s):	Manufacturin Manufacturin	
	Tretrainee					
					Priority Indus	stry: ⊠Yes      No
Counties Served:	Alameda		Repea Contra		🛛 Yes 🗌 No	
Union(s):	Union(s): Yes No					
Number of	umber of Employees in: CA: 1		132	U.S.:	166	Worldwide: 166
Turnover Rate: 7%						
Managers/Supervisors: (% of total trainees)19%						

In-Kind Contribution

\$65,825

Total ETP Funding	
\$52,440	

Occupations to be Trained:	Manufacturing/Production Staff,
	Manager/Supervisor, Quality Control Staff,
	Shipping/Receiving, Engineering Staff,
	Administrative Staff, Sales Staff

## **TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range Hou Class / Lab		Average Cost per Trainee	Post- Retention Wage*
1	Retrainee Priority	Business Skills Computer Skills Continuous Impr. Mfg. Skills Mgmt. Skills	114	8 - 200 Weightee 20	•	\$460	\$20.86

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: \$20.86/hr. in Alameda County

Health Benefits: Used to meet the Post-Retention Wage?: ⊠ Yes □ No

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for trainees in Job Number 1.

In addition, the Company pays regular quarterly bonuses to all staff of approximately \$600 per employee. This equates to approximately \$1.15/hr., which may be used for trainees to meet the ETP minimum wage.

## **OVERVIEW**

Parent Company			Delphon Holdings, Inc.				
Year Company Founded:	1997	Company	pany Headquarters:  Single location				
Facility Locations	Outside 0	A	Wilsonville, Oregon				
Total Number of F California	acility loc	ations in	1				
Facility location(s) will occur	) where tr	aining	Hayward, Alameda County				
Participating Affiliates & Respective Facility Locations where training will occur:			<ul> <li>Delphon Industries, LLC dba Gel-Pak</li> <li>Delphon Holdings, Inc. will hold the ETP contract; however, most training will occur for trainees at Delphon Industries, LLC. dba Gel Pak located in Hayward, CA where both entities are co-located.</li> </ul>				
Customer Base:			• Delphon serves customers in the medical, semiconductor, industrial and photonics industries.				

Nature of Business:	<ul> <li>The Company has two major divisions in CA, the first, Gel Pak, manufactures casings and packages for sensitive materials for the semiconductor industry. The casings are used for processing, transport and storage and contain a patented gel that holds computer chips in place without introducing foreign objects that may harm the chips.</li> <li>The second division, called TouchMark provides precision printing for medical devices, including printing on very small devices. TouchMark meets the needs of medical device customers by utilizing clean room facilities, enabling it to handle a variety of orders ranging from small to large-scale product volumes.</li> </ul>
Business / Industry Needs / Changes	<ul> <li>Delphon has seen increases in orders from its existing customer base. This may be due, in part to an effect of the pandemic as customers are stockpiling critical medical equipment.</li> <li>The Company will be hiring a Quality Assurance Director who will oversee and implement new continuous improvement and lean manufacturing process over the coming year. In addition, as Delphon looks to improve the quality of its products, it expects to modify existing products for efficiency's sake and potentially implement new products.</li> <li>Delphon is looking to expand its customer base and reach new customers in the next two years. As such, it has been revamping its sales and marketing approach. It is updating its website and expects to aggressively recruit new customers in the coming months.</li> <li>Recently, the company implemented new EPICOR ERP software systems across the organization. Now that the software has been fully implemented, Delphon plans to introduce new modules to leverage overall process efficiencies. This will include modules for administrative staff, engineering staff and manufacturing staff.</li> </ul>

## Training Plan:

Need for Training:	• As the Quality Assurance tea manufacturing processes and efficiencies where needed, it	looks to implement
	will receive lean manufacturin and programing operations a operations as new products a existing products are optimiz	nd assembly are introduced and
	All staff will receive training or platform module upgrades and platform module upgrades	

		<ul> <li>In addition, the Company will cross the organization. This will include c production staff on assembly operat machining. It will also include cross administrative staff.</li> </ul>	ross training for tions and
--	--	---	--------------------------------

Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

🛛 Class/lab	E-Learning	🗆 СВТ	Productive Lab
	MS Preceptor	☐ MS Didactic	

Business Skills	Computer Skills	Continuous Improvement
Management Skills	Manufacturing Skills	

## Training Infrastructure & Administrative Plan

•	Project Oversight:
	This project will be overseen by the Human Resources Director with assistance by the Human Resources Manager.
٠	Trainers:
	In-house – Types of Training: Business Skill, Computer Skills, Continuous Improvement, Management Skills, Manufacturing Skills
	Vendor – Types of Training by vendor:
	51 5 5
٠	Administration:
	Administration will be performed by the HR team in-house. The HR Director will oversee the project and has prior experience working with an ETP contract. The HR Manager will assist with the tracking and input of rosters. Currently, the Company is tracking training via paper-based rosters and have systems in place for tracking training.
	⊠ In-house
	□ Subcontractor

### **SUBCONTRACTORS**

N/A

#### Exhibit B: Menu Curriculum

#### Class/Lab Hours

8-200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Sales and Marketing Techniques
- Supply Chain
- Customer Service
- COVID-19 Safety
- Accounting Skills

#### **COMPUTER SKILLS**

- HRIS and Payroll Systems
- Microsoft Office Suite Intermediate
- Epicor System

#### **CONTINUOUS IMPROVEMENT**

- Continuous Improvement Techniques
- Frontline Decision Making and Problem solving
- ISO
- Quality Management
- Supply Chain Communication

#### MANAGEMENT SKILLS (management trainees only)

- First Time Supervisors
- Conflict Resolution
- Coaching/Mentoring

#### MANUFACTURING SKILLS

- Advanced Manufacturing
- Assembly Operations
- Clean Room Operations
- High Precision Inspection
- Machining and Programing
- Production Technologies
- Lean Manufacturing
- Hazardous Materials Handling

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

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



## **EXPANSION FUNDS**

## **RETRAINEE - JOB CREATION**

## **Training Proposal for:**

# **Gradelink Corporation**

# Delegation < \$75,000 Single Employer

## Contract Number: ET22-0133

Approval Date: October 13, 2021

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: K. Hernandez

## PROJECT PROFILE

Contract Priority Rate		Industry		Services (G)			
Attributes:	Retrainee		Sector(s):		Professional, Scientific Technology (54)		
	SB <100						
	Job Creation Initiative			Priority Industry:		try: XYes DNo	
	Expansion Funds (Alt/Ge	en)			Priority Industry: Yes No		
	Counties Orange		Repea		⊠Yes □1		
Served:	orango		Contra	ictor:			
Union(s):	🗌 Yes 🛛 No						
Number of	Employees in:	CA:	28 U.S.: 28		28	Worldwide: 28	
Turnover R	<u>ate</u> :	4%					
Managers/Supervisors: N/A							
	·						
In-Kind Contribution					Total F		

ETP 130 – Delegation - SE (3/05/2020)

\$95,680

\$38,180

Small Business Only:	Owner ⊠ Yes □ No Contract Term □ One Year ⊠ Two Year
Out-of-State Competition:	⊠ Yes □ No
Occupations to be Trained:	Technical Support Staff, Sales/Marketing Staff, Accounting Staff, Administration Staff, Web Developers/ QA Analysts, Feature Specialists, Owners

## TRAINING PLAN TABLE

Job	lak Daarintian	T	Estimated	Range of Hours		Average Cost per Trainee	Post- Retention Wage*
No.	Job Description	Type of Training	raining No. of Trainees		CBT		
1	Retrainee	Business Skills	25	8-200	0	\$1,380	\$19.12
	Priority	Comm Skills Computer Skills		Weighte	d Avg:		
	SB<100	Continuous Impr.		60			
2	Retrainee	Business Skills	2	8-200	0	\$1,840	\$20.01
	Priority	Comm Skills Computer Skills		Weighte	d Avg:		
	SB<100	Continuous Impr.		80	Ū		
	Job Creation						

\*Post-Retention Wage is the Contractual Wage

**Minimum Wage by County:** Job Number 1: Orange-\$19.12/hr.; Job Number 2: Orange-\$15.93/hr. **Health Benefits: Used to meet the Post-Retention Wage?:**  $\square$  Yes  $\square$  No Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1.

### **OVERVIEW**

Year Company Founded:	2003	Company Headquarters: Single location Foothill Ranch			
Nature of Busines	s:	<ul> <li>Gradelink Corporation (Gradelink) developed a school administration software system that connects students, parents, teachers and school administrators.</li> <li>Gradelink's school administration system can be accessed via a web browser or a mobile phone application. The system provides users with tools including academic reporting, financial billing, teacher grade books, standards assessments, parent access, and attendance tracking.</li> </ul>			

Customer Base:	<ul> <li>Private K-8 schools, high schools and college departments.</li> </ul>
Business / Industry Needs / Changes	<ul> <li>Gradelink has a customer base of approximately 1,700 schools. The Company projects continuing growth of customer base in 2021 and 2022 of 200-300 customers per year. A significant part of this growth will be driven by attracting customers outside of California where private schools are in need of customized school administration software systems.</li> <li>As schools transition back from distance learning to in-person classes the needs of school administrators will change. Gradelink will need to create new products and services to help schools make it through the COVID-19 pandemic.</li> </ul>

### **Training Plan:**

Need for Training:	<ul> <li>Training for Sales/Marketing Staff, Technical Support Staff, and Web Developers will consistently address the requests and needs of existing customers.</li> <li>Gradelink's largest market is in the United States but its international customer base is growing. Training Sales/Marketing Staff and Technical Support Staff on changes to products for international customers is critical to retaining customers and growing revenues.</li> <li>The Company is growing quickly and scaling its</li> </ul>
	8 8

Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

Class/lab

E-Learning

□ CBT

Productive Lab

☐ MS Preceptor

☐ MS Didactic

**Business Skills Commercial Skills Computer Skills Continuous Improvement** 

Job Creation Justification	Expanding existing business capacity by adding newly-
	hired employees to an existing function.

#### Training Hours

☑ Weighted Average Hours over 45	60 Hours for retrainees (Job Number 1) and 80 Hours for
	Job Creation trainees (Job Number 2)

The Company's training plan is complex and the retrainee and Job Creation trainees need extensive training. Gradelink expects to provide at least 160 hours of training for programmers on its software development tools and processes based on its current training plan (6 - 8 weeks, depending on an employee's technical expertise).

Gradelink's prior performance is a key indicator of the Company's ability to deliver the amount of training requested. In its prior contract, Gradelink delivered an average of 63 hours of training for retrainees (Job Number 1) and 88 hours of training for Job Creation trainees (Job Number 2).

#### Training Infrastructure & Administrative Plan

Project Oversight:	
Gradelink's Human Resources Manager wil	oversee overall administration of the project.
Trainers:	
In-house – Types of Training: Business Continuous Improvements	Skills, Commercial Skills, Computer Skills,
Administration:	
, , , , , , , , , , , , , , , , , , , ,	n upon approval. In addition, the Company retained th administrative duties. Training will be delivered d.
□ In-house	
Subcontractor	

#### **Repeat Contract**

Number Of Contracts in last 5 years:	1
<ul> <li>Training provided / focus in last Contract:</li> </ul>	The prior ETP contract helped the Company prepare for the launch of products and services in international markets. Additionally, the Company developed a mobile application.
Difference in Training Plan:	This project will help the Company deliver training focused on creating new products and services for customers that are integrating online distance learning modules into their curriculum.

### PRIOR PROJECTS

The following table summarizes performance under an ETP Contract completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET19-0383	Foothill Ranch	1/10/2019- 1/9/2021	\$35,360	\$35,360 (100%)

### **SUBCONTRACTORS**

Subcontractor Type	Cube entre eter Neme		Cost / %	
Development	Sierra Consulting Services Inc.	El Dorado Hills	\$3,800	
Administrative	Sierra Consulting Services Inc.	El Dorado Hills	13% of payment earned	
Training Vendors	N/A	N/A	N/A	

#### Exhibit B: Menu Curriculum

#### Class/Lab/ E-Learning Hours

8-200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Administration
- Behavior Style Strategies
- Business Communication
- Business Fundamentals
- Communication Styles
- Company Culture Development
- Customer Service
- Develop Employee Accountability
- Finance and Financial Analysis
- International Business Fundamentals
- International Compliance
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques & Strategy
- Operational Skills
- Organizational Structure Development
- Planning and Organization
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Relationship Building
- Strategic Planning

#### **COMMERCIAL SKILLS**

- Create Gradelink Help Articles
- Create Training Videos
- Customer Service Skills
- Data Entry Skills
- Education Rules & Regulations
- Education Standards
- Gradelink Platform Overview
- Implementation Skills
- International Education Overview
- Product Knowledge
- School Attendance
- School Classes & Scheduling
- School Curriculum
- School Discipline
- School Medical Records
- School Report Cards
- School Tuition

#### COMPUTER SKILLS

- CRM
- Financial Management System
- Progressive Web Apps (PWA)
- Quickbooks
- SQL Server (Management Studio)
- Virtual Machine Software

#### **CONTINUOUS IMPROVEMENT**

- Agile Project Management
- Change Management
- Communication Skills
- Cross-Training
- How to Coach and Mentor
- Leadership
- Machine Maintenance
- Machine Operation
- Meeting Management
- Motivation
- Problem Solving and Decision Making
- Process Capability
- Process Improvement
- Production Operations/Workflow
- Production Scheduling
- Project Management
- Quality Measurement Systems
- Teambuilding
- Time Management
- Troubleshooting

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

**DELEGATION ORDER** 



# **EXPANSION FUNDS**

## **Training Proposal for:**

# **National Veterans Chamber of Commerce**

## Contract Number: ET22-0137

Approval Date: October 21, 2021

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: L. Vuong

## PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Retrainee Priority Rate Veterans SB <100	Industry Sector(s):	MEC (H) Manufacturing (33) Aerospace Related Professional, Scientific, Technology (54) Priority Industry: X Yes No	
Counties Served: Union(s):	Statewide □ Yes ⊠ No	Repeat Contractor:	☐ Yes ⊠ No	
Turnover Rate:		≤20%		
Managers/Supervisors: (% of total trainees)		≤20%		

## FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$66,700		\$8,100 8% and 20%		\$74,800
In-Kind Contribution:	50% of	Total ETP Funding Required	I	\$110,450

#### TRAINING PLAN TABLE

Job Job Description			Estimated No. of	Range of Hours		Average Cost per	Post- Retention
No.	Job Description	5	Trainees	Class / Lab	CBT	Trainee	Wage*
1	Retrainee	Business Skills,	50	8-200	0	\$713	\$19.12
	Priority Rate Computer Skills, Cont. Imp., Literacy Skills, Mfg. Skills		Weighted Avg: 29				
2	Retrainee Priority Rate Veterans	Business Skills, Computer Skills, Cont. Imp., Literacy Skills, Mfg. Skills	50	8-200 Weighter 29	•	\$783	\$19.12

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: <u>Job Numbers 1 & 2:</u> \$20.86 per hour for Alameda, Marin, San Mateo, Santa Clara and San Francisco counties; \$20.79 per hour for Contra Costa County; \$19.77 per hour for Los Angeles County; and \$19.12 per hour for all other Counties

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

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

Participating employers may use health benefits up to \$2.50 per hour to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Job Number 1		
		2
Administrative/Operational Staff		3
		5
		1
Customer Service Staff		2
		2
		2
Lead/Production Staff		3
		5
		2
Machine Operator		3
		5
		1
Manager/Supervisor		2
		2
		2
Technician		3
		5

Job Number 2 (Veterans)		
	2	
Administrative/Operational Staff	3	
	5	
	1	
Customer Service Staff	2	
	2	
	2	
Lead/Production Staff	3	
	5	
	2	
Machine Operator	3	
	5	
	1	
Manager/Supervisor	2	
	2	
	2	
Technician	3	
	5	

## **INTRODUCTION**

Founded in 2017, and headquartered in Oceanside, National Veterans Chamber of Commerce (NVCC) (www.nationalveterans.org) is a non-profit corporation. Its mission is to promote and improve opportunities for Veterans of the U.S. Military Services. NVCC brings together programs, projects, organizations, people, and resources to the Military/Veteran communities. NVCC's main goal is to promote collaboration and support innovative ideas that will address Military/Veteran challenges faced during pre and post-transition. It focuses on issues that show transformative potential, including Education, Employment, Family, Wellness and Entrepreneurship. NVCC is a Collaboration-Driven Organization opens to new ideas and new strategies that will benefit Veterans in local and statewide communities. Headquartered in Oceanside, NVCC has locations and representation throughout California, located in San Diego, Orange County, Inland Empire and Northern California. NVCC is determined eligible to contract with ETP as a Group of Employers per Title 22, California Code of Regulations, Sections 4400(j)(3). This is NVCC's first ETP Contract.

NVCC services approximately 4,000 members in California. This includes private businesses, non-profit organizations, governmental agencies, educational institutions and military bases. NVCC works with entities in various industries including manufacturing, agriculture, transportation, warehouse, technology, educational institutes, and real estate. Hundreds of men, women, children and families of Veterans have come to NVCC over the past four years seeking assistance to create a better quality of life for themselves and their communities. NVCC is dedicated to assisting individuals and businesses seeking better employment, career paths, supporting and promoting business interests, and making existing businesses more competitive in California.

#### Veterans Program

NVCC is committed to supporting job-related training that helps Veterans transition into the California workforce. NVCC is focused on helping these underserved Veterans and has been effectively providing placement services for these individuals (including education, job-related training, job search, interview skills, resume preparation and job fairs) for the past several years. NVCC attends networking events, local community meetings, career days, and reaches out to local career organizations to specifically target Veterans, women, and minority groups, which will increase recruitment and retention of more Veterans and underserved populations in the area. NVCC also works with Military bases, Veterans Chamber of Commerce, Veterans of Foreign Wars, Veterans Partnering with Communities, Inc., OneVet OneVoice, local county offices of education, local community colleges and community outreach organizations. NVCC trains and places approximate 150 to 200 Veterans into employment annually. NVCC will train 50 Veterans (Job Number 2). Veteran training curriculum will be the same as Retrainee (Job Number 1). Veteran trainees are in a separate Job Number to better track performance toward goal of improved outreach for Veterans.

A portion of the Veteran population participating in this project may include transitioning active duty Veterans within one year from their anticipated separation from service.

Retention Modification

The Panel may modify the retention period for the trainees in Job Number 2. For purpose of retention, 30 hours per week will be accepted as full-time employment during a consecutive 90-day period, with a single employer. In the alternative, for training in occupations where it is not customary to be employed for consecutive days, retention may be 500 hours within 272 days with one or more employers. NVCC requests this retention modification for Job Number 2.

# PROJECT DETAILS

NVCC is focused on economic growth, upgrading job-related skills, and job retention in the San Diego area and neighboring cities/counties. Its goal for the next 24 months is to "source" collaborative partners to create best practices in job creation and retention. NVCC has received an overwhelming response from participating employers that expressed a need to improve productivity and upgrade the skill level of their workforce. This includes increases in manufacturing skills, customer services, keep up with rapidly changing technology, sufficient business operation, fill behind retired workers and the impact of the COVID-19 pandemic.

ETP-funded training will provide participating employers the opportunity to sustain competitiveness, grow their businesses, meet customer demand, create new job opportunities, increase wages and retention, remain current with rapidly changing technology, and adapt to the new business environment resulting from the COVID-19 pandemic. NVCC is focused on providing opportunities to companies that do not have the resources available to provide needed training to their employees and helping them bring innovative processes and new technology to the workforce.

## Training Plan/Employer Demand

Training outlined in this proposal is customized, based on employer needs assessments and training objectives. NVCC conducts interviews with employers, community organizations, advisory board and training experts to maintain a comprehensive curriculum that is relevant and responsive to training needs. In addition, participating employers are encouraged to complete post-training evaluations. This feedback is used by NVCC to measure the quality of training and gauge how it meets employer demands. The proposed training will provide trainees with sufficient

Business, Computer, Continuous Improvement, Manufacturing Skills needed to work more efficiently and effectively, keep up with current technology and make themselves more competitive in the job market. It is also designed to provide trainees with targeted skills that will increase trainee's ability to find suitable employment and perform to the employer's satisfaction.

The core group of employers consist of seven large companies and thirteen small businesses, which represents over 100% of requested funding for this proposal, and have made firm commitments to participate upon Panel approval. The proposed training will be offered to employers statewide. NVCC anticipates 40% of training will be conducted at participating employer worksites; and 60% will be center-based.

Training will be provided via Class/Lab, Video Conference and E-Learning in the following:

**Business Skills**: This training will be offered to all occupations to improve communication, customer relations, and problem solving skills and enhance employee knowledge on business operations.

**Computer Skills**: This training will be offered to all occupations. Training will allow trainees to effectively use software applications that run and support business operations, to keep up with current technology and teach trainees to work more efficiently and effectively.

**Continuous Improvement**: This training will be offered to all occupations and will equip trainees with the skills to achieve company goals through increased productivity, quality and process improvement.

**Literacy Skills**: This training will be offered to Customer Service Staff, Lead/Production Staff, Machine Operators and Technicians. Training will enable employees with limited English Skills to increase their speaking, listening and comprehension skills in the workplace.

**Manufacturing Skills**: This training will be offered to Customer Service Staff, Lead/Production Staff, Machine Operators, Technicians and Managers/Supervisors. As technology advances and companies upgrade equipment into a more automated environment, trainees will learn new technological skills along with proper equipment operating and maintenance techniques.

#### E-Learning and Video Conference

NVCC utilizes online training as a delivery method. Training is provided online by a live instructor. This delivery method is cost effective, efficient and suitable for some employers and trainees. E-Learning and Video Conference will complement Class/Lab training.

#### Commitment to Training

Most of the participating employers, especially small companies, lack the resources and funding to conduct formal and structured training. The majority provide on-the-job, one-on-one training to new employees, basic safety, company orientation, sexual harassment prevention, violence in the workplace prevention, active shooter and facility overview. For some participating employers, this project will be an opportunity to participate in a formal training program for the first time. For other companies that may have only provided limited training in the past, ETP funding will enable them to provide a larger number of employees with a broader spectrum of skills development, introduce new business practices and services to sustain growth and remain competitive.

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

#### Training Infrastructure

Training is scheduled to begin upon Panel approval. The Executive Director will oversee project training administration with three staff member (Project Manager and Administrator) to coordinate marketing, recruitment, needs assessments, enrollment, scheduling classes and maintain all record of training. NVCC will also utilize a third party vendor with ETP experience to ensure that all training records adhere to ETP requirements.

#### Trainer Qualifications

Training will be provided by NVCC's in-house Chamber members and training experts. Instructors have a minimum of 12 to 15 years of experience and are considered subject-matter experts. Outside professional experts may be used only if specific technical skills are required and unavailable internally.

#### Impact/Outcome

Upon completion of various training, trainees will receive Certification of Completion (Attendance Certificate), which will increase opportunities for career advancement and wage increases.

#### Marketing and Support Costs

NVCC has established relationships with other chambers, community members, California's Manufacturing Network, San Diego Professional Development Association, collaborative networks of businesses, Employer and Trade Associations, the Farm Bureau and Small Franchise Organizations. NVCC hosts meetings and uses emails, websites, digital marketing and in-person visits to employers to promote training and business opportunities, procurement news, government-assisted programs and various networking events. NVCC seeks full Support Costs of 8% (Job Number 1) and 20% (Job Number 2 Veterans) to fund extensive marketing efforts to recruit additional participating employers and assessment activities of employers. Staff believes 8% and 20% Support Costs are justified in this proposal for the reasons set forth above.

#### **Tuition Reimbursement**

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

#### **DEVELOPMENT SERVICES**

NVCC retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of \$3,950.

#### ADMINISTRATIVE SERVICES

Training Funding Source 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, Videoconference & E-Learning Hours

8-200 Trainees may receive any of the following:

## **BUSINESS SKILLS**

- Business Writing Reports
- Business Operations
- Coaching
- Communication
- Customer Service and Sales
- Empowering Employees to Increase Productivity
- Dealing with Conflict
- Employee Retention and Promotion
- How to Effectively Motivate Employees
- Financial Management
- How to Create Effective Teams
- How to Conduct Effective office Meetings
- Project Management
- Task Delegation
- Time Management
- Problem Solving Skills

## **COMPUTER SKILLS**

- Canva (Graphic Design)
- Canvas Learning Management System
- Customer Relationship Management
- Facebook for Business
- Google Apps
- HyperText Markup Language for Web Maintenance
- Linked In for Business
- Microsoft Office
- Publisher
- Sales Force Program
- Skype for Applications
- Zoom for Business
- Video Conferencing

# **CONTINUOUS IMPROVEMENT**

- Process Improvement/Standardization
- Quality Improvement
- Problem Solving and Critical Thinking

# LITERACY SKILLS

- Business writing
- Report preparation
- English language proficiency
- Reading, writing
- Problem solving

- Business math
- Information technologies
- Communication skills

## MANUFACTURING SKILLS

- Equipment Operations
- Problem Solving Skills
- Project Management and Goal Setting
- How to Write and Understand Code
- Skills to Program Manufacturing Specific Machines and Devices
- Machining, Fabricating, and Complex Assembly
- Big Data Analytics
- Understanding and Programming Robotics

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.

Contractor's Name: National Veterans Chamber of Commerce	CCG No.: ET22-0137			
Reference No: 21-0943	Page 1 of 6			
ALPHABETIZE BY COMPANY NAME				
Company: Akae Builder	Priority Industry? Xes Do			
Address: 28316 Wilkes Road				
City, State, Zip: San Diego, CA 92111				
Collective Bargaining Agreement(s): No				
Estimated # of employees to be retrained under this Contract: 20	Small Business? 🛛 Yes 🗌 No			
Total # of full-time company employees worldwide: 50				
Total # of full-time company employees in California: 50				
Company, Albert Flactric				
Company: Albers Electric	Priority Industry? 🛛 Yes 🗌 No			
Address: 3024 Fried Ave				
City, State, Zip: San Diego, CA 92122				
Collective Bargaining Agreement(s): No				
Estimated # of employees to be retrained under this Contract: 12	Small Business? 🛛 Yes 🗌 No			
Total # of full-time company employees worldwide: 25				
Total # of full-time company employees in California: 25				
Company: Alphagraphics	Priority Industry? 🛛 Yes 🗌 No			
Address: 1920 Oceanside Blvd.				
City, State, Zip: Oceanside, CA 92054				
Collective Bargaining Agreement(s): No				
Estimated # of employees to be retrained under this Contract: 12	Small Business? 🛛 Yes 🗌 No			
Total # of full-time company employees worldwide: 35				
Total # of full-time company employees in California: 35				

Contractor's Name: National Veterans Chamber of Commerce	CCG No.: ET22-0137			
Reference No: 21-0943	Page 2 of 6			
Company: AlphaTec Industries Medical equipment Manufacturing	Priority Industry? 🛛 Yes 🗌 No			
Address: 1950 Camino Vida Roble				
City, State, Zip: Carlsbad, CA 92008				
Collective Bargaining Agreement(s): No				
Estimated # of employees to be retrained under this Contract: 35	Small Business? 🗌 Yes 🖾 No			
Total # of full-time company employees worldwide: 250				
Total # of full-time company employees in California: 250				
Company: American Pride General Engineering Inc	Priority Industry? 🛛 Yes 🗌 No			
Address: 549 W. Fourth Ave.				
City, State, Zip: Escondido, CA 92025				
Collective Bargaining Agreement(s): No				
Estimated # of employees to be retrained under this Contract: 15 Small Business? 🛛 Yes				
Total # of full-time company employees worldwide: 50				
Total # of full-time company employees in California: 50				
Total # of full-time company employees in California: 50 Company: Beckman & Coutler Medical equipment Manufacturing	Priority Industry? 🛛 Yes 🗌 No			
	Priority Industry? Xes INo			
Company: Beckman & Coutler Medical equipment Manufacturing	Priority Industry? 🛛 Yes 🗌 No			
Company: Beckman & Coutler Medical equipment Manufacturing Address: 2470 Faraday Ave.	Priority Industry? ⊠ Yes  ☐ No			
Company:Beckman & Coutler Medical equipment ManufacturingAddress:2470 Faraday Ave.City, State, Zip:Carlsbad, CA 92010	Priority Industry? Yes No			
Company:Beckman & Coutler Medical equipment ManufacturingAddress:2470 Faraday Ave.City, State, Zip:Carlsbad, CA 92010Collective Bargaining Agreement(s):No				
Company: Beckman & Coutler Medical equipment Manufacturing         Address: 2470 Faraday Ave.         City, State, Zip: Carlsbad, CA 92010         Collective Bargaining Agreement(s): No         Estimated # of employees to be retrained under this Contract: 35				
Company: Beckman & Coutler Medical equipment ManufacturingAddress: 2470 Faraday Ave.City, State, Zip: Carlsbad, CA 92010Collective Bargaining Agreement(s): NoEstimated # of employees to be retrained under this Contract: 35Total # of full-time company employees worldwide: 300				
Company: Beckman & Coutler Medical equipment ManufacturingAddress: 2470 Faraday Ave.City, State, Zip: Carlsbad, CA 92010Collective Bargaining Agreement(s): NoEstimated # of employees to be retrained under this Contract: 35Total # of full-time company employees worldwide: 300Total # of full-time company employees in California: 300	Small Business?  Yes  No			
Company: Beckman & Coutler Medical equipment ManufacturingAddress: 2470 Faraday Ave.City, State, Zip: Carlsbad, CA 92010Collective Bargaining Agreement(s): NoEstimated # of employees to be retrained under this Contract: 35Total # of full-time company employees worldwide: 300Total # of full-time company employees in California: 300Company: Blueprint Contracting	Small Business?  Yes  No			
Company: Beckman & Coutler Medical equipment ManufacturingAddress: 2470 Faraday Ave.City, State, Zip: Carlsbad, CA 92010Collective Bargaining Agreement(s): NoEstimated # of employees to be retrained under this Contract: 35Total # of full-time company employees worldwide: 300Total # of full-time company employees in California: 300Company: Blueprint ContractingAddress: 2926 Upas Street	Small Business?  Yes  No			
Company: Beckman & Coutler Medical equipment ManufacturingAddress: 2470 Faraday Ave.City, State, Zip: Carlsbad, CA 92010Collective Bargaining Agreement(s): NoEstimated # of employees to be retrained under this Contract: 35Total # of full-time company employees worldwide: 300Total # of full-time company employees in California: 300Company: Blueprint ContractingAddress: 2926 Upas StreetCity, State, Zip: San Diego, CA 92104	Small Business?  Yes  No			
Company: Beckman & Coutler Medical equipment ManufacturingAddress: 2470 Faraday Ave.City, State, Zip: Carlsbad, CA 92010Collective Bargaining Agreement(s): NoEstimated # of employees to be retrained under this Contract: 35Total # of full-time company employees worldwide: 300Total # of full-time company employees in California: 300Company: Blueprint ContractingAddress: 2926 Upas StreetCity, State, Zip: San Diego, CA 92104Collective Bargaining Agreement(s): No	Small Business?  Yes No Priority Industry? Yes No			

Contractor's Name: National Veterans Chamber of Commerce	CCG No.: ET22-0137		
Reference No: 21-0943	Page 3 of 6		
Company: Callaway Golf Manufacturing			
	Priority Industry? 🛛 Yes 🗌 No		
Address: 2180 Rutherford Rd.			
City, State, Zip: Carlsbad, CA 92008			
Collective Bargaining Agreement(s): No			
Estimated # of employees to be retrained under this Contract: 50	Small Business? 🗌 Yes 🛛 No		
Total # of full-time company employees worldwide: 250			
Total # of full-time company employees in California: 250			
Company: Calvada Surveying Inc.	Priority Industry? 🛛 Yes 🗌 No		
Address: 411 Jenks Circle			
City, State, Zip: Corona ,CA 92880			
Collective Bargaining Agreement(s): No			
Estimated # of employees to be retrained under this Contract: 15	Small Business? 🛛 Yes 🗌 No		
Total # of full-time company employees worldwide: 25			
Total # of full-time company employees in California: 25			
Company: Cement Cutting	Priority Industry? 🛛 Yes 🗌 No		
Address: 3610 Hancock St.			
City, State, Zip: San Diego, CA 92110			
Collective Bargaining Agreement(s): No			
Estimated # of employees to be retrained under this Contract: 10	Small Business? 🛛 Yes 🗌 No		
Total # of full-time company employees worldwide: 20			
Total # of full-time company employees in California: 20			
Company: Ceramic Tile Supply	Priority Industry? 🛛 Yes 🗌 No		
Address: 3310 Via De La Valle			
City, State, Zip: Oceanside, CA 92058			
Collective Bargaining Agreement(s): No			
Estimated # of employees to be retrained under this Contract: 15	Small Business? 🛛 Yes 🗌 No		
Total # of full-time company employees worldwide: 45			
Total # of full-time company employees in California: 45			

Contractor's Name: National Veterans Chamber of Commerce	CCG No.: ET22-0137
Reference No: 21-0943	Page 4 of 6
Company: Chrysanthemum Software	
	Priority Industry? 🛛 Yes 🗌 No
Address: 10601-G361 Tierrasanta Boulevard	
City, State, Zip: San Diego, CA 92124	
Collective Bargaining Agreement(s): No	
Estimated # of employees to be retrained under this Contract: 10	Small Business? 🛛 Yes 🗌 No
Total # of full-time company employees worldwide: 20	
Total # of full-time company employees in California: 20	
Company: Datron Communications Manufacturing	Priority Industry? 🛛 Yes 🗌 No
Address: 3055 Enterprise Ct.	
City, State, Zip: Vista, CA 92081	
Collective Bargaining Agreement(s): No	
Estimated # of employees to be retrained under this Contract: 35	Small Business? 🗌 Yes 🛛 No
Total # of full-time company employees worldwide: 250	
Total # of full-time company employees in California: 250	
Company: Dr, Brooner Soap manufacturing	Priority Industry? 🛛 Yes 🗌 No
Address: 1335 Park Center Dr.	
City, State, Zip: Vista, CA 92081	
Collective Bargaining Agreement(s): No	
Estimated # of employees to be retrained under this Contract: 35	Small Business? 🗌 Yes 🖾 No
Total # of full-time company employees worldwide: 350	
Total # of full-time company employees in California: 350	
Company: Hunter Industries	Priority Industry? 🛛 Yes 🗌 No
Address: 1940 Diamond St.	
City, State, Zip: San Marcos, CA 92078	
Collective Bargaining Agreement(s): No	
Estimated # of employees to be retrained under this Contract: 35	Small Business? 🗌 Yes 🛛 No
Total # of full-time company employees worldwide: 300	
Total # of full-time company employees in California: 300	

Contractor's Name: National Veterans Chamber of Commerce	CCG No.: ET22-0137				
Reference No: 21-0943	Page 5 of 6				
Company: KSD Print	Priority Industry? 🛛 Yes 🗌 No				
Address: 4065 Oceanside Blvd.					
City, State, Zip: Oceanside, CA 92056					
Collective Bargaining Agreement(s): No					
Estimated # of employees to be retrained under this Contract: 10	Small Business? 🛛 Yes 🗌 No				
Total # of full-time company employees worldwide: 25					
Total # of full-time company employees in California: 25					
Company: Moore Twining Associates, Inc construction inspections	Priority Industry? Xes Do				
Address: 500 Harrington					
City, State, Zip: Riverside, CA 92503					
Collective Bargaining Agreement(s): No					
Estimated # of employees to be retrained under this Contract: 10	Small Business? 🛛 Yes 🗌 No				
Total # of full-time company employees worldwide: 50					
Total # of full-time company employees in California: 50					
Company: ROC Industries - plumbing an supplies	Priority Industry? 🛛 Yes 🗌 No				
Address: 2057 Aldergrove Avenue					
City, State, Zip: Escondido, CA 92029					
Collective Bargaining Agreement(s): No					
Estimated # of employees to be retrained under this Contract: 12	Small Business? 🛛 Yes 🗌 No				
Total # of full-time company employees worldwide: 22					
Total # of full-time company employees in California: 22					
Company: Team West Contracting	Priority Industry? 🛛 Yes 🗌 No				
Company: Team West Contracting Address: 1151 Pomona Rd.	Priority Industry? 🛛 Yes 🗌 No				
	Priority Industry? 🛛 Yes 🗌 No				
Address: 1151 Pomona Rd.	Priority Industry? 🛛 Yes 🗌 No				
Address:       1151 Pomona Rd.         City, State, Zip:       Corona, CA 92880	Priority Industry? Yes No				
Address: 1151 Pomona Rd.         City, State, Zip: Corona, CA 92880         Collective Bargaining Agreement(s): No					

Contractor's Name: National Veterans Chamber of Commerce	CCG No.: ET22-0137
Reference No: 21-0943	Page 6 of 6
Company: Watkings Manufacturing	Priority Industry? 🛛 Yes 🗌 No
Address: 1280 Park Center Dr.	
City, State, Zip: Vista, CA 92081	
Collective Bargaining Agreement(s): No	
Estimated # of employees to be retrained under this Contract: 50	Small Business? 🗌 Yes 🛛 No
Total # of full-time company employees worldwide: 200	
Total # of full-time company employees in California: 200	



**EXPANSION FUNDS** 

# **Training Proposal for:**

# **O'Neil Digital Solutions, LLC**

# Delegation < \$75,000 Single Employer

# Contract Number: ET22-0139

Approval Date: October 22, 2021

Panel Meeting of: November 19, 2021

ETP Regional Office: North Hollywood

Analyst: D. Tran

# PROJECT PROFILE

	ontract ttributes:			Industry Sector(s):		Services (G) Information / Multi Media (51)		
					Priority Indus	stry: ⊠Yes  □No		
			Repea Contra		🗌 Yes 🖾 No			
U	nion(s):	🗌 Yes 🛛 No						
Number of Employees in: CA:		528	28 U.S.: 528 Worldwide: 528		Worldwide: 528			
<u>T</u> (	urnover R	ate:	10%				I	
Managers/Supervisors: (% of total trainees)6%								
In-Kind Contribution						Total E	TP Funding	
	\$84 585					\$	55 200	

Occupations to be Trained:	Corporate Support Staff, Customer Service Staff,
	Engineering/Information Technology Staff,
	Production Staff, Manager

# **TRAINING PLAN TABLE**

Job	Job Description	Type of Training	Estimated	Range of Hours		Average	Post-
No.			No. of Trainees	Class / Lab	СВТ	Cost per Trainee	Retention Wage*
1	Retrainee	Business Skills Computer Skills	80	8-200	0-100	\$690	\$19.77
	Priority	Continuous Impr.		Weighte 30	•		

\*Post-Retention Wage is the Contractual Wage

Minimum Wage by County: Los Angeles County: \$19.77/Hour
Health Benefits: Used to meet the Post-Retention Wage?: ⊠ Yes □ No
Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1.

# **OVERVIEW**

Parent Company			William O'Neil Companies			
Year Company Founded:	1973	Compan	Company Headquarters: X Single location			
Facility location(s will occur	) where tr	aining	Los Angeles (Los Angeles County)			
Nature of Busines	s:		O'Neil Digital Systems, LLC (ODS) offers services and solutions in the areas of document creation and management, Omni-channel communications, interactive software services, data analytics, and consulting services.			
Customer Base:			The Company services a variety of industries including healthcare, financial services, retail, publishing, entertainment, automotive, manufacturing, and educational industries. ODS offers powerful platforms, enabling companies to effectively communicate and engage with each customer's unique wants and needs.			
Business / Indust Changes	ry Needs /	/	• Due to the COVID 19 pandemic, ODS experienced a substantial increase in adoption of its products and services as companies around the world had to quickly adjust business operating procedures and methods of both reaching and communicating with customers through digital platforms. ODS offers a Onesuite platform that provides companies the tools			

	<ul> <li>to better improve the communication and experience between companies and their clients.</li> <li>The increased adoption and demand in ODS' products and services have led to a need for greater knowledge of products by company staff. The Company recently launched a new product tailored to the financial services industry, which requires respective customer service engagement.</li> <li>With the on-going growth, the company is currently working on launching additional new products and services to meet the demands of its clients.</li> </ul>
--	---

# Training Plan:

Need for Training:	Due to rapid growth the company needs to ensure
	<ul> <li>but to rapid growth the company needs to ensure that all employees are adequately trained on all products and services currently available and forthcoming to ensure their customers receive the highest quality of service and product knowledge from internal employees.</li> <li>The launching of new products and services requires extensive training so that all employees can make the appropriate recommendations and provide proper training to its clients.</li> <li>ODS plans to implement a full Kaizen strategy across the entire organization to improve quality.</li> <li>ODS recently hired a training director, launched a Learning management system, and purchased a training curriculum program that will be launched throughout the entire organization to formalize a corporate training and development program which will create a robust training program for all employees.</li> </ul>

Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

⊠ Class/lab	🛛 E-Learning	🛛 СВТ
-------------	--------------	-------

Business Skills	Computer Skills
Continuous Improvement	

# Training Infrastructure & Administrative Plan

## • Project Oversight:

In 2021, with the launch of the new ONESuite product, the Company spent \$125,000 in training. The Company still provides on-going standard training in areas of safety, sexual harassment, general on-boarding, and other federally mandated 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.

This project will be overseen and administered by the Director of Organizational Learning and Development and the Sr. Learning and Development Coordinator along with six internal trainers who are subject matter experts.

<u>Electronic Recordkeeping/LMS</u>: Staff has reviewed and approved the Company's learningmanagement system, Cornerstone On Demand and has verified it meets all ETP record keeping requirements.

• Trainers:

Training will be provided by in-house subject-matter experts who are the most senior employees in the Company. The training will also be aided by a robust training curriculum that was recently purchased and tailored for the organization.

#### • Administration:

The company has retained the services of Training Funding Partners in Huntington Beach to assist with the administration of this project.

□ In-house

Subcontractor

# SUBCONTRACTORS

Subcontractor Type	Subcontractor Name	City	Cost / %
Development	Training Funding Partners	Huntington Beach	\$3,860
Administrative	Training Funding Partners	Huntington Beach	Not to exceed 13% of payment earned.
Training Vendors	To Be Determined		

## Exhibit B: Menu Curriculum

#### Class/Lab Hours/E-Learning Hours:

8-200 Trainees may receive any of the following:

## **BUSINESS SKILLS**

- Advanced Safety Skills/Hazard Communication
- Business Acumen
- Business Process Skills
- Communication/Collaboration Skills
- Customer Service/Support Skills
- Finance/Accounting Skills
- Negotiation Skills
- Marketing/Sales Skills
- Meeting Management Skills
- Presentation Skills
- Train-the-Trainer

## **COMPUTER SKILLS**

- Computer Language Skills
- Cybersecurity Skills
- Data Storage Technology Skills
- Intermediate/Advanced Microsoft Office
- Proprietary Software System Skills
- Software/Hardware Skills

## **CONTINUOUS IMPROVEMENT**

- Change Management
- Decision Making
- Delegation Skills
- Engineering/Product Design Skills
- Kaizen Skills
- Leadership Skills
- Problem Solving Skills
- Process/Performance Improvement/Management Skills
- Project/Program Management
- Quality Assurance/Quality Control
- Setting Goals/Objectives
- Team Development
- Troubleshooting/Root Cause Analysis

#### **CBT Hours**

0-100 Trainees may receive any of the following:

## **BUSINESS SKILLS**

- Calm and Focused Selling (Mindfulness) (1.5 hours)
- Color Theory Essentials (1 hours)
- Content Marketing for Beginners (5.4 hours)
- Content Marketing Masterclass (3.5 hours)
- Creating Flow (1 hours)

- Idea Generation: Coming Up with Killer Business Ideas (5 hours)
- Idea Validation | From Idea to Paying Customer in 1 day (5.35 hours)
- Writing Emails People Want to Read (1 hours)

# **COMPUTER SKILLS**

- 3D Printing Course (3 hours)
- Adobe Illustrator CC Essentials Training (5 hours)
- Adobe InDesign CC a Complete Introduction (2 hours)
- Adobe InDesign CC Advanced Training (7 hours)
- Adobe InDesign CC Interactive! (1.75 hours)
- Adobe Lightroom CC: Photo Editing Course (4 hours)
- Adobe Lightroom Classic CC: Photo Editing Course (7.5 hours)
- Adobe Lightroom For Beginners (2 hours)
- Adobe Photoshop CC Intermediate (3.25 hours)
- Adobe Photoshop CC Introduction (4 hours)
- Adobe Premiere Pro CC: Easy Video Editing with Premiere Pro (6 hours)
- After Effects Learn Motion Graphic Design (5 hours)
- After Effects CC: The Complete Guide to After Effects CC (10 hours)
- After Effects: Advanced Shape Layer, Hipster Motion Graphics (3 hours)
- Become a Successful Innovator Part 3: The CO-STAR Method for Proving Your Brilliant Idea (0.5 hours)
- Canon DSLR Photography (3.25 hours)
- Complete DSLR Video Production Course (3 hours)
- Dive into After Effects: Flat Animation Buildup (0.75 hours)
- Dive Into After Effects: Learn the Basics (0.5 hours)
- Dive Into After Effects: Learn to Animate Motion Graphics (0.75 hours)
- Every Adobe Illustrator Tool Explained (5.75 hours)
- Figma for Digital Product Design (2.5 hours)
- Final Cut Pro 7 from Scratch: Become a Great Video Editor (3.5 hours)
- Google Analytics Quick Start (0.75 hours)
- GoPro for Beginners: How to Shoot & Edit Video with a GoPro (1.5 hours)
- Graphic Design Masterclass Learn GREAT Design (8 hours)
- HitFilm Express For Beginners (2.5 hours)
- How to Colorize Black and White Photos in Photoshop (2.5 hours)
- How To Create a Flat Design Office Space in Illustrator (2 hours)
- How To Create Flat Design Icons In 15 Minutes in Illustrator (3 hours)
- How to Design a Website in Photoshop (2.75 hours)
- How To Master Pen Tool in Illustrator and Photoshop (1.75 hours)
- How to Use After Effects Templates for Beginners (0.75 hours)
- Indesign Essential Training (5.5 hours)
- Kinetic Typography Crash Course Create Motion Graphic Text (1 hours)

- Landscape Photography: You Can Take Your Own Stunning Photos (3.25 hours)
- Learn Adobe Dreamweaver Creative Cloud (12 hours)
- Learn Figma: User Interface Design Essentials UI/UX Design (7 hours)
- Mac Photos: Photo Editing, Organizing, & Sharing (4 hours)
- Master Adobe Photoshop Elements 13 (15 hours)
- Master Adobe Photoshop Elements 14 For Beginners Course (16 hours)
- Master Adobe Photoshop Elements 15 the Easy Way (14.5 hours)
- Night Photography: You Can Shoot Stunning Night Photos (1 hours)
- Photography Fundamentals (0.75 hours)
- Photography Masterclass (4 hours)
- Photography Masterclass: A Complete Guide to Photography (17 hours)
- Premiere Pro & Dreamweaver Fullscreen Background Video for a Website (2 hours)
- Premiere Pro for Corporate Video (1.5 hours)
- UI & Web Design using Adobe Illustrator (4 hours)
- UI/UX & Web Design Using Adobe XD (5.5 hours)
- Video Production Bootcamp (2.5 hours)
- Visual Design for Web Designers, UI Designers and Developers (5 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of method of delivery. CBT is capped at 100 total hours.



**EXPANSION FUNDS** 

**Training Proposal for:** 

# W C Heating & Air Conditioning, Inc. dba We Care

# Delegation < \$75,000 Single Employer

# Contract Number: ET22-0142

Approval Date: October 18, 2021

Panel Meeting of: November 19, 2021

ETP Regional Office: San Diego

Analyst: J. Lima

# PROJECT PROFILE

Contract Attributes:	Expansion Funds (Alt/Gen) Retrainee Priority Rate			istry or(s):	Construction	(C)
					Priority Indus	stry: ⊠Yes  □No
Counties Served:	Riverside, Orange		Repea Contra		🛛 Yes 🗌 No	
Union(s):	nion(s): 🗌 Yes 🖾 No				·	
Number of Employees in: C		CA:	156	U.S.:	156	Worldwide: 156
Turnover Rate: 1		17%				
Managers/Supervisors: (% of total trainees)		N/A				

In-Kind Contribution

\$105,000

Total ETP Funding	
\$65,550	

Occupations to be Trained:	Service Technician/Installer; Customer		
	Service/Dispatch; Support/Operations Staff		

# TRAINING PLAN TABLE

Job	lak Daarintian	T	Estimated	Range of Hours		Average	Post-
No.	Job Description	Type of Training	No. of Trainees	Class / Lab	CBT	Cost per Trainee	Retention Wage*
1	Retrainee	Business Skills Comm Skills	75	8-200	0	874	\$19.12
	Priority	Computer Skills		Weighte 38	•		
		Continuous Impr.		30			

#### \*Post-Retention Wage is the Contractual Wage

It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail. \*ETP Required Wage floats down to a High Unemployment Area wage modification if trainees in Job number are located in an HUA, regardless if they are requesting a wage modification.

Minimum Wage by County: Job Number 1 (\$19.12 Orange and Riverside Counties)

Health Benefits: Used to meet the Post-Retention Wage?: ⊠ Yes □ No

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job 1.

Commissions & Bonuses (Non-Retail) (service Tech/Install):

If necessary, up to \$11.08 in bonuses and commissions may be used for Service

Technicians/Installers occupation in Job 1 to meet the minimum wage by County

Wage Range by Occupation						
Occupation Titles	Actual Wage Range	Estimated # of Trainees				
		19				
Service Technician/Installer		8				
		28				
Customer Service/Dispatch		15				
Support/Operations Staff		5				

# **OVERVIEW**

Year Company Founded:	2000	Company Headquarters: Murrieta, CA.			
Facility location(s will occur	) where tr	aining	•	Murrieta, CA (Riverside County) and Orange, CA (Orange County).	

Nature of Business:	<ul> <li>W C Heating &amp; Air Conditioning, Inc. dba We Care (We Care) is a residential Contractor that installs, services and maintains a wide variety of air conditioning, plumbing, heating, solar and indoor air quality products including thermostats, furnaces, heat pumps, duct work and insulation.</li> </ul>
Customer Base:	<ul> <li>We Care serves residential customers in Riverside, Orange, San Bernardino, Northern San Diego and parts of Los Angeles Counties.</li> </ul>

Business / Industry Needs / Changes	<ul> <li>We Care is experiencing a high demand for its services resulting in an increase in company growth from 24 employees in 2009 to 156 employees in 2021.</li> <li>The Company is making organizational changes to support client relations with a Customer</li> </ul>
	Relationship Management (CRM) System and an Integrated Contact Center Platform (8x8).

# Training Plan:

Need for Training:	• We Care will utilize training to provide more sophisticated skill sets for its employees enabling them to handle more projects due to the aforementioned high demand and company growth. These skill sets include: business, commercial,
	computer skills and continuous improvement. Training will increase work output sufficient to maintain the increased demand for company services
	• To support its organizational change employees will need to be trained in a variety of areas including the new CRM and 8x8. This will provide a stronger workforce with skills necessary to complete projects efficiently.

Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

🛛 Class/lab

E-Learning

□ CBT

Productive Lab

□ MS Preceptor □

□ MS Didactic

	Business Skills	Computer Skills
Commercial Skills	Continuous Improvement	

## Training Infrastructure & Administrative Plan

## • Project Oversight:

The project will be overseen by the Human Resources Manager, and six internal trainers. Learning Administrators at each facility will be in charge of ensuring training data is correctly documented. We Care is ready to begin training upon approval.

## • Trainers:

⊠ In-house – Types of Training: Business Skills, Commercial Skills; Computer Skills; Continuous Improvement Skills.

☑ Vendor – Types of Training by vendor: To Be Determined as necessary

## • Administration:

The project's administrative tasks will be completed by National Training Partners.

In-house

⊠ Subcontractor

# **Repeat Contract**

Number Of Contracts in last 5 years:	We Care has held 1 contract in the last 5 years with ETP.
Training provided / focus in last Contract:	The training in the previous ETP Agreement focused on improved Company processes and new technologies in the residential HVAC industry at that time.
Difference in Training Plan: This new project will focus on the new technology implementation, as well as new markets based on the growth and technological changes affecting the indus over the next two years.	

# PRIOR PROJECTS

The following table summarizes performance under an ETP Contract completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$%
ET17-0458	Murrieta, CA	04/11/17 to 04/10/19	\$70,240	\$64,370 (92%)

# **SUBCONTRACTORS**

Subcontractor Type	Subcontractor Name	City	Cost / %
Development	Training Funding Partners	Huntington Beach	\$6,600
Administrative	Training Funding Partners	Huntington Beach	13% of Contract Earnings
Training Vendors	TBD	TBD	TBD

#### Exhibit B: Menu Curriculum

#### Class/Lab Hours/E-Learning

8-200 Trainees may receive any of the following:

#### Business Skills

- Business Processes & Procedures
- Client Service/Communication Skills
- Coordinating and Scheduling Service/Dispatching
- Equipment and Industry Overview
- Finance/Accounting Skills
- Logistics/Warehouse Skills
- Maintenance/Membership Programs
- Marketing/Sales Skills
- New/Upgraded Product Knowledge and Service Skills
- Residential Heating and Air Conditioning Industry/Equipment Overview (non-technicians)
- Train-the-Trainer
- Writing Quotes/Financing

#### Commercial Skills

- Electricity/Voltage & Schematics
- Equipment Diagnostics/Maintenance/Management
- Maintaining Merchandise Inventory/Warehouse Skills
- Residential Cooling/Heating Equipment and Installation/Maintenance Skills
- Residential Ducting/Equipment and Installations
- Residential Electrical/Plumbing Equipment Installation/Maintenance Skills
- Residential Indoor Air Quality and updated Technology
- Residential Smart Equipment Technology/Controls
- Sustainability Concepts and Skills
- System Troubleshooting

#### **Computer Skills**

- Call Center/Dispatch Application Skills
- Enterprise Resource Planning (ERP) System
- Intermediate/Advanced Microsoft Office (Word, Excel, PowerPoint)
- Payment Card Certification
- Proprietary System/Technology Skills
- Tablet Computer Applications

#### Continuous Improvement Skills

- Change Management Skills
- Leadership Skills
- Problem Solving Skills
- Process Improvement Skills
- Project Management Skills
- Root Cause Analysis and Remediation
- Time Management Skills

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

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