

# PANEL PACKET

October 2023



Employment Training Panel



# PANEL NOTICE/AGENDA

## MEETING TIME/PLACE

Friday, October 27, 2023 at 9:30 a.m.  
CalEPA, 1001 I Street  
Sierra Room  
Sacramento, CA 95814  
Phone: (916) 327-5640

**This is a public meeting and the public may attend in person or virtually.**

To view or provide public comment via webinar, use the link below and use the raise-hand feature during public comment to be called on.

### **Join Zoom Meeting:**

<https://us06web.zoom.us/j/86994462382>

**Webinar ID:** 869 9446 2382

**One tap mobile:** 888 278 0296 US Toll-free

**Conference code:** 1185529

(For assistance, login and raise hand or contact [Ryan.Boyd@etp.ca.gov](mailto:Ryan.Boyd@etp.ca.gov))

Call to Order by Chair

Rebecca Bettencourt

- Roll Call
- Action to Approve October Panel Meeting Agenda
- Action to Approve September Panel Meeting Minutes

---

Executive Report

- Budget/Other
- Budget Update and Action on Allocations
- Request Motion to Adopt Consent Calendar Projects/Action

Peter Cooper  
Tara Armstrong  
Michael Cable  
Jaime Gutierrez

---

Policy Committee Report

Gretchen Newsom

---

Audit Presentation

Shannon Spence

---

Review and Action on Proposals

Kellen Hernandez  
Ryan Swier  
Chris Hoover  
Phil Boyer

Panel Date: October 27, 2023

---

Opportunity for Panel Members to Request Agenda Items for Future Panel Meetings

---

Public Comment on Matters Not on the Agenda

---

Public Meeting Adjourns

\*Public comment can be done in person or virtual

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

The meeting is accessible to the physically disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting, including without limitation auxiliary aids or services, may make a request by contacting Michael A. Cable, 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.

## **REVIEW AND ACTION ON PROPOSALS**

These funding proposals are listed by Regional Offices and do not reflect the actual order of presentation. They will be considered by the Panel in accordance with a Table of Contents to be published on the ETP website no later than Monday, October 16, 2023, 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.

### **North Hollywood Regional Office**

Appfolio, Inc. -----	\$424,166
Entegris, Inc. -----	\$391,000
Greenheart Farms, Inc. -----	\$135,125
Rockview Dairies, Inc. dba Rockview Farms -----	\$157,320
Snak King LLC -----	\$153,640
Sorenson Engineering, Inc. -----	\$298,080
Studio Arts, LTD. -----	\$361,494
Super Center Concepts, Inc. dba Superior Grocers -----	\$349,965
University Lab Partners -----	\$190,625

### **San Diego Regional Office**

Alpha Mechanical, Inc. -----	\$157,550
Axelgaard Manufacturing Co., LTD -----	\$140,300
Earthlite, LLC -----	\$133,400
Newman Replacement Windows, Inc. -----	\$201,250
Quality Controlled Manufacturing, Inc. -----	\$99,452
Sherwood Mechanical, Inc. -----	\$294,975

### **San Francisco Regional Office**

Agilent Technologies, Inc. -----	\$499,560
Aegeus Inspection Solutions Services, Inc. -----	\$294,975
Boehringer Ingelheim Fremont, Inc. -----	\$499,560
California Manufacturing and Engineering Co., LLC -----	\$191,429
Lyell Immunopharma, Inc. -----	\$276,000
Prothena Biosciences Inc. -----	\$144,900
SOMA AEC, Inc. dba Oxman College -----	\$749,808
Western Digital Technologies, Inc. -----	\$303,600

**Sacramento Regional Office**

Advanced Integrated Pest Management -----	\$316,560
CiminoCare -----	\$386,147
Cook General Engineering, Inc. -----	\$94,944
FM Industries, Inc.-----	\$324,760
Infinity Energy, Inc. dba Infinity Energy (RESPOND) -----	\$661,220
Jon K. Takata Corporation dba Restoration Management (RESPOND)-----	\$594,895
Keysight Technologies, Inc.-----	\$499,560
Montage Medical Group -----	\$335,616
O'Neill Beverages Co. LLC dba O'Neill Vintners & Distillers -----	\$186,392
Oregon Pacific Building Products (CALIF) Inc. -----	\$438,840
San Joaquin County Economic Development Association-----	\$146,862
Silgan Containers Manufacturing Corporation -----	\$198,720
Workforce Development Board of Contra Costa County dba WDBCCC-----	\$749,675

## **PROPOSALS APPROVED**

### **BY DELEGATION ORDER FOR 09/19/23 – 10/16/23**

<b>≤ \$75,000</b>	<b>Approved Date</b>	<b>Approved Amount</b>
<b><u>North Hollywood Regional Office</u></b>		
Autism Behavior Service Inc.	09/25/23	\$34,086
Etchegaray Farms LLC	10/16/23	\$74,290
Gustav Keoni dba Precision Construction Services	10/16/23	\$36,570
<b><u>San Francisco Regional Office</u></b>		
E.A. Machining, Inc.	10/09/23	\$6,900
<b><u>Sacramento Regional Office</u></b>		
L&M Logistics Groups, Inc.	10/13/23	\$52,440



State of California—Labor and Workforce Development Agency

# Employment Training Panel

## TABLE OF CONTENTS

Panel Meeting of October 27, 2023

### PRELIMINARY MATTERS

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

### OTHER MATTERS

PowerPoint for Audit Presentation

### REVIEW AND ACTION ON PROPOSALS

#### **Consent Calendar**

#### **Tab**

Agilent Technologies, Inc.-----	1
Alpha Mechanical, Inc.-----	2
Axelgaard Manufacturing Co., LTD-----	3
Boehringer Ingelheim Fremont, Inc.-----	4
California Manufacturing and Engineering Co., LLC-----	5
Cook General Engineering, Inc.-----	6
Earthlite, LLC-----	7
Greenheart Farms, Inc.-----	8
O'Neill Beverages Co. LLC dba O'Neill Vintners & Distillers-----	9
Prothema Biosciences Inc.-----	10
Quality Controlled Manufacturing, Inc.-----	11
Rockview Dairies, Inc. dba Rockview Farms-----	12
Silgan Containers Manufacturing Corporation-----	13
Snak King LLC-----	14
University Lab Partners-----	15

**Proposals for Single-Employer Contractors** **Tab**

**North Hollywood Regional Office**

Appfolio, Inc. -----	16
Entegris, Inc. -----	17
Sorenson Engineering, Inc.-----	18
Super Center Concepts, Inc. dba Superior Grocers-----	19

**San Diego Regional Office**

Newman Replacement Windows, Inc. -----	20
Sherwood Mechanical, Inc.-----	21

**San Francisco Regional Office**

Aegeus Inspection Solutions Services, Inc. -----	22
Lyell Immunopharma, Inc. -----	23
Western Digital Technologies, Inc. -----	24

**Sacramento Regional Office**

Advanced Integrated Pest Management -----	25
CiminoCare -----	26
FM Industries, Inc. -----	27
Infinity Energy, Inc. dba Infinity Energy (RESPOND) -----	28
Jon K. Takata Corporation dba Restoration Management (RESPOND) -----	29
Keysight Technologies, Inc. -----	30
Montage Medical Group-----	31
Oregon Pacific Building Products (CALIF) Inc. -----	32

**Proposals for Multiple-Employer Contractors** **Tab**

**North Hollywood Regional Office**

Studio Arts, LTD. -----	33
-------------------------	----

**San Francisco Regional Office**

SOMA AEC, Inc. dba Oxman College -----	34
--	----

**Sacramento Regional Office**

San Joaquin County Economic Development Association -----	35
Workforce Development Board of Contra Costa County dba WDBCCC-----	36

## **SUMMARY OF DELEGATION ORDERS**

### ***Delegation Orders***

***Tab***

Autism Behavior Service Inc.

E.A. Machining, Inc.

Etchegaray Farms LLC

Gustav Keoni dba Precision Construction Services

L&M Logistics Group, Inc.



# M e m o r a n d u m

To: Panel Members

From: Peter Cooper  
Assistant Director

Subject: **Directions Meeting Sites**

Date October 27, 2023

The Employment Training Panel will meet on **Friday, October 27<sup>th</sup>, 2023 at 9:30 a.m.**

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

Telephone (916) 327-5640 (ETP Central Office)

## **Directions to the California Environmental Protection Agency - Coastal Room**

### **From Sacramento International Airport:**

- Take **Hwy 5 South**
- Exit on **“J” Street to 11<sup>th</sup> St.**
- Turn Left on **11<sup>th</sup> Street**
- Turn Left on **I Street**
- **1001 I Street**

### **From San Francisco**

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



# M e m o r a n d u m

To: Panel Members

Date October 27, 2023

From: Peter Cooper  
Assistant Director

Subject: **Future Meeting Sites**

<b><i>October Panel October 27<sup>th</sup>, 2023</i></b>	<b>In Person – CalEPA Sierra Room 1001 I St, Sacramento, CA 95814 Friday 9:30 AM – 3:30 PM</b>
<b><i>November Panel – N/A</i></b>	<b>No Panel Meeting</b>
<b><i>December Panel December 15<sup>th</sup>, 2023</i></b>	<b>In Person – CalEPA Coastal Room 1001 I St, Sacramento, CA 95814 Friday 9:30 AM – 3:30 PM</b>



**STATE OF CALIFORNIA  
EMPLOYMENT TRAINING PANEL**

**Friday, September 29, 2023**

**Panel Members**

Rebecca Bettencourt  
Chair

Dee Dee Myers  
*Ex-Officio* Member

Rick Smiles  
Member

Ernesto Morales  
Member

Gretchen Newsom  
Member

Douglas Tracy  
Member

Madison Hull  
Member

Michael Hill  
Member

**Executive Staff**

Peter Cooper  
Acting Director

Jaime Gutierrez  
Chief Deputy Director

Tara Armstrong  
Deputy Director of Technical Branch

Michael Cable  
Staff Attorney

**STATE OF CALIFORNIA  
EMPLOYMENT TRAINING PANEL  
California Environmental Protection Agency  
1001 I Street, Sierra Room, Second Floor  
Sacramento, California 95814  
Friday, September 29, 2023**

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

Chair Bettencourt called the meeting to order at 9:37 a.m.

**II. ROLL CALL**

Present

Rebecca Bettencourt  
Gretchen Newsom  
Rick Smiles  
Doug Tracy  
Michael Hill  
Chris Dombrowski

Not in attendance

Madison Hull  
Ernesto Morales

Executive Staff

Peter Cooper, Acting Executive Director  
Jaime Gutierrez, Chief Deputy Director  
Tara Armstrong, Deputy Director of Technical Branch  
Michael Cable, Staff Attorney

**III. AGENDA**

The September Agenda was reviewed.

ACTION: Member Newsom moved and Member Smiles seconded approval of the September Agenda with a modification to consider the apprenticeship proposals by industry and trade together as listed and grouped in the table of contents. All Panel Members present voted in the affirmative for approval as moved.

Motion carried, 6 to 0.

**IV. MINUTES**

The August Meeting Minutes were reviewed.

ACTION: Member Newsom moved and Member Smiles seconded the approval of the August Meeting Minutes with no changes. All Panel Members present voted in the affirmative for approval as moved.

Motion carried, 6 to 0.

## **V. REPORT FROM THE ACTING EXECUTIVE DIRECTOR**

ETP is waiting for a new director to be appointed in the interim Secretary Knox has appointed myself (Peter Cooper) as acting director. Today's meeting presents 77 proposals totaling approximately \$27.1 million to support 226,568 trainees.

## **VI. UPDATE ON CAL-E-FORCE**

Under the Cal-E-Force program we have sent stakeholder messages that occupation is being collected at final invoice now (this will allow us to see how occupations evolve throughout projects. Some enhancements that have been added are multiple training subcontractors, out of state training questions, health benefit questions, assigning occupations to curriculum and training type allocations percentages. These additional questions during the application phase should help Panel proposals to be more complete. Stakeholder recommendations will soon be added.

## **VII. LEGISLATIVE AND LEGAL UPDATE**

The public comment period has expired and we are now waiting for FPPC final approval, which will be a letter which is then also sent to the Secretary of State for final endorsement. After which we will be in compliance.

Quick legislative update October 14<sup>th</sup> is the last day for the Governor to sign or veto any bills that have passed through the Legislature.

SB 544 which is the bill to amend the Bagley Keene act allowing for more flexibility to have teleconference meeting. We had the ability previously but with a lot of onerous requirements, such as locations, public access, notice etc. During the pandemic emergency orders allowed us to fully teleconference meeting without have those requirements. This bill would make significant permanent changes within the Bagley Keene code itself. The Governor has approved SB 544 which will become effective in the coming year. More substantive reports on those changes at our next Panel meeting. The ability to consider teleconference meetings and what that would look like.

Agency has reached out to ETP for any proposals for legislation in the coming year. The legal unit has had a preliminary meeting with executive staff and several issues are being reviewed (primarily technical issues and antiquated language that need to be changed). We will keep the Panel updated.

## **VIII. REPORT OF THE CHIEF DEPUTY DIRECTOR**

### **Regarding Funding:**

Expansion and CCC Funds will expire at the end of this State Fiscal Year 23/24, in June 2024. In order to assist in managing ETP staff's workload and meet the requirement of dispensing the funds by June 2024, we are requesting that any extension requests be made as soon as possible, and no later than October 15, 2023.

Today's Panel meeting for approximately \$26.9 million, includes three Delegation Orders with a total of \$158,677. Delegation Orders are Proposals capped at \$75K and approved under delegated authority by the Executive Director on a continuous flow basis. If all proposals scheduled for this Panel Meeting are funded today, the Panel will be approving 77 projects. These projects also include 4 Healthcare Workforce Advancement Fund projects for \$2.2 million.

### **Regarding Demand and Allocations:**

There are 124 applications currently in demand and 104 applications are with the Regional Offices in development. With 17 applications under review with the applications and assessment unit and 3 submitted applications pending review. The estimated value of the 124 applications is \$27.7 million (\$21.8 million for single employers, \$4.1 million for multiple employer contracts, \$172,522 for small business, \$1.6 for apprenticeship proposals, and zero in demand for Critical Proposals. We are currently within our total allocations for this fiscal year 2023-24.

## **IX. CONSENT CALENDAR**

Tab 4 (Santa Clarita Community College District) was pulled from the consent calendar.

ACTION: Member Newsom moved and Member Smiles seconded approval of the Consent Calendar without Tab 4 (Santa Clarita Community College District),

Motion carried, 6 to 0.

## **X. APPRENTICESHIP PRESENTATION**

Given by Chief Eric Rood from the Division of Apprenticeship Standards, Heather Miguel, and Willie Atkinson.

## **XI. ACTION ON PROPOSALS**

Public comment from Kelly Greer regarding lag in reporting and how there can be a difference in the contract % in just one day. This is due to computer systems and checks that are in place that are necessary.

Public comment from Jeremy Smith thanking Panel.

## **PULLED CONSENT CALENDAR**

### **Tab No. 4: Santa Clarita Community College District**

Repeat contractor. Funding requested \$749,785 to train 650 retrainees and 45 job creation trainees statewide. Participating employers have provided Union support letters.

Question regarding employer Classic Wire has 129 employees in California but training 180 to be retrained.

Sean Millburn explained that it was a typo they are set to train 90-100 employees.

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Santa Clarita Community College District in the amount of \$749,785. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **HEALTHCARE WORKFORCE ADVANCEMENT**

### **Tab No. 5: SOMA AEC, Inc. dba Oxman College**

Repeat MEC contractor. Funding requested \$735,048 to train 249 retrainees. Since attending July Panel, they have addressed questions and concerns that were raised by Panel. The participating employers' target population has shifted from statewide to the Bay Area counties in Yuba County. The HUA wage modification is no longer necessary. Trainees have increased in Job numbers 1 and 2. Occupation titles have been consolidated and training hours have decreased from 150 to 120 hours. Additionally trainers are full time employees and will provide training on site.

Concern was raised regarding the low wages under Job number 2 (job creation) and the certified nursing assistants (CNA) at only 18.54 per hour up to \$20 per hours. The rest of the occupation titles have a big gap other applicants are paying much higher wages. Request was made to changes Job number 2 wages to Job number 1 wages.

Clarification was all CNA's in Job number 2 up to \$21.01 to \$22 per hour and all the CNA's in Job number 1 to the same. Mental health aides have the same wage range for Job numbers 1 and 2, no changes. All the other job occupations will be moved to the \$21.01 to \$22 per hour wage range.

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by SOMA AEC, Inc. dba Oxman College in the amount of \$735,048, with the understanding that we are moving the minimum wages for the CNA's up to \$21.01 -\$22 per hour and lifting the wages listed at the lower amount in Job number 2 up to the higher amount listed in Job number 1. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

**Tab No. 6: St. Joseph Health Northern California LLC**

First time contractor. Funding requested \$499,859 to train 211 retrainees.

ACTION: Member Smiles moved and Member Newsom seconded approval of the proposal submitted by St. Joseph Health Northern California LLC in the amount of \$499,859. All Panel Members present voted in the affirmative to table the proposal as moved.

Motion carried, 6 to 0.

**Tab No. 7: St. Mary Medical Center dba St. Mary Regional Medical Center**

First time contractor. Funding requested \$498,640 to train 271 retrainees in one job number.

Amy Grimsley stated they have a correction they just completed Union negotiations and the started wage for the RN's is now \$51 per hour.

ACTION: Member Smiles moved and Member Newsom seconded approval of the proposal submitted by St. Mary Medical Center dba St. Mary Regional Medical Center in the amount of \$498,640. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

**Tab No. 8: Kaweah Delta Health Care District Guild dba Kaweah Health**

First time contractor. Funding requested \$499,928 to train 247 workers.

Panel would like the proposal to reflect the new wages. The new wages for CNA's will be \$16.42-\$24.63 per hour. The LVN is \$39.43.

Hannah Mitchell agreed with the changes.

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Kaweah Delta Health Care District Guild dba Kaweah Health in the amount of \$499,928. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

**SINGLE EMPLOYER CONTRACTS**

**Tab No. 9: Doctors Hospital of Riverside LLC**

First time contractor. Funding requested \$458,850 to train 550 retrainees and 25 job creation trainees located in Riverside.

ACTION: Member Smiles moved and Member Newsom seconded approval of the proposal submitted by Doctors Hospital of Riverside LLC in the amount of \$458,850. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

**Tab No. 10: Johnson, Finch & McClure Construction, Inc.**

First time contractor. Funding requested \$354,246 to train 302 retrainees over two job number.

Concern was raised regarding the growth which is a huge growth over two year. You have 205 employees in California and 198 you are retraining, then another 104. Worry is regarding performance.

Bill Saks stated that they could come down to 50 people in the Job 2 category and keep the 198 retrainees.

Clarification was made regarding the estimated number of trainees being changed to 50 total in job number two and changing the total funding to \$295,596.

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Johnson, Finch & McClure Construction, Inc. in the amount of \$295,596. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

**Tab No. 11: Newman Replacement Window, Inc.**

WITHDRAWN.

**Tab No. 12: TC Construction, Inc.**

First time contractor. Funding requested \$356,891 to train 236 retrainees over two job numbers.

ACTION: Member Newsom moved and Member Tracy seconded approval of the proposal submitted by TC Construction, Inc. in the amount of \$356,891. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

**Tab No. 13: Temecula Valley Hospital, Inc.**

Repeat contractor. Third ETP project in the last 5 years. Funding requested \$427,800 to train 381 retrainees.

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Temecula Valley Hospital, Inc. in the amount of \$427,800. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **APPRENTICESHIPS**

### **FABRICATED METAL PRODUCTS APPRENTICESHIP**

#### **Tab No. 72: California Tooling and Machining Apprenticeship Association**

ACTION: Member Smiles moved and Member Newsom seconded approval of the proposal submitted by California Tooling and Machining Apprenticeship Association in the amount of \$49,700. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

Questions around repeat contractors and prior contract enrollment completion percentages arose. Several employers were asked why the percentages reported from prior contracts were so low. Ultimately it was decided to bring this to Policy Committee to discuss and determine if or how we would proceed with repeat contractors and low reported contract completion rates.

### **FINISHING TRADES APPRENTICESHPS**

#### **Tab No. 35: Finishing Trades Institute of Northern California and Nevada Trust Fund-Painters FTI West**

#### **Tab No. 36: Finishing Trades Institute of Northern California and Nevada Trust Fund-Drywall Finishers/Floor Coverers FTI West**

#### **Tab No. 37: Finishing Trades Institute of Northern California and Nevada Trust Fund-Glaziers FTI West**

#### **Tab No. 38: Finishing Trades Institute of District Council 36 Joint Apprenticeship Training Fund**

#### **Tab No. 39: Glaziers, Architectural Metal and Glass Workers Local Union No. 636**

#### **Tab No. 40: Southern California Plastering Institute Apprenticeship Trust**

#### **Tab No. 41: Tile, Marble and Terrazzo Employees Joint Apprenticeship Training Committee Trust**

#### **Tab No. 42: Northern California Tile Industry Apprenticeship and Training Trust Fund**

Motion made to approve Tabs 35-42.

ACTION: Member Smiles moved and Member Smiles seconded the motion to approve Tabs 35-42. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **ELECTRICAL APPRENTICESHIPS**

- Tab No. 14: Orange County Electrical Joint Apprenticeship and Training Trust**
- Tab No. 15: Sacramento Area Electrical Workers Joint Apprenticeship and Training Trust**
- Tab No. 16: Santa Clara County Electrical Industry Apprenticeship and Training Trust**
- Tab No. 17: NECA/IBEW Inland Training Fund**
- Tab No. 18: San Mateo County Electrical Apprenticeship and Training Trust**
- Tab No. 19: San Diego Electrical Training Trust**
- Tab No. 20: Los Angeles County Electrical Educational and Training Trust Fund**
- Tab No. 21: Alameda County Electrical Industry Apprenticeship and Training Trust**
- Tab No. 22: Kern County Electrical Journeyman and Apprentice Training Trust**
- Tab No. 23: Local 100 International Brotherhood of Electrical Workers Joint Electrical Training Trust Fund**
- Tab No. 24: San Joaquin and Calaveras County Electrical Industry Apprenticeship and Training Fund**
- Tab No. 25: San Francisco Electrical Industry Apprenticeship and Training Trust**
- Tab No. 26: Redwood Empire Electrical Joint Apprenticeship Trust**
- Tab No. 27: Ventura County Electrical Joint Apprenticeship and Training Trust**
- Tab No. 28: Central Valley Electrical Industry Training & Educational Trust**
- Tab No. 29: Santa Barbara County Electrical JATC**
- Tab No. 30: Napa-Solano Counties Electrical Industry Apprenticeship and Training Trust Fund**
- Tab No. 31: San Luis Obispo County Electrical Join Apprenticeship & Training Trust**

Member Newsom recused herself.

Motion made to approve Tabs 14-31.

ACTION: Member Smiles moved and Member Tracy seconded the motion to approve Tabs 14-31. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 5 to 0.

## **LABORERS APPRENTICESHIPS**

- Tab No. 32: Laborers Training and Re-Training Trust Fund for Southern California**
- Tab No. 33: Laborers Health and Welfare Trust Fund for Northern California**
- Tab No. 34: Pavement Stripers and Highway Maintenance Apprenticeship and Training Trust for Southern California**

Member Smiles recused himself.

Motion made to approve Tabs 32-34.

ACTION: Member Newsom moved and Member Tracy seconded motion to approve Tabs 32-34. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 5 to 0.

## **BRICKLAYERS APPRENTICESHIP**

**Tab No. 43: Bricklayers and Allied Crafts Local No. 3 Apprenticeship Training Fund**

**Tab No. 44: Brick Masons Apprenticeship Training Fund**

Motion made to approve Tabs 43 and 44.

ACTION: Member Newsom moved and Member Smiles seconded the motion to approve Tabs 43 and 44. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **SHEET METAL/HVAC APPRENTICESHIPS**

**Tab No. 45: El Camino Community College District**

**Tab No. 46: LA Downtown Medical Center, LLC**

**Tab No. 47: National Immigration Forum, Inc.**

**Tab No. 48: Taylor Farms Pacific, Inc.**

**Tab No. 49: UDW Resource Center**

**Tab No. 50: LY Brothers Corporation dba Sugar Bowl Bakery**

**Tab No. 51: True Organic Products, Inc.**

Member Doug Tracy recused himself

Motion made to approve Tabs 45-51.

ACTION: Member Newsom moved and Member Smiles seconded the motion to approve Tabs 45-51. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 5 to 0.

## **LEAD ENTITY APPRENTICESHIP**

**Tab No. 52: State Building and Construction Trades Council of California**

Member Newsom recused herself.

ACTION: Mr. Dombrowski moved and Member Smiles seconded approval of the proposal submitted by State Building and Construction Trades Council in California in the amount of \$499,920. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 5 to 0.

## **PLUMBING & PIPE FITTING APPRENTICESHIPS**

Tab No. 53: Local 422-Pipke Trades District No. 36 Journeyman and Apprenticeship Training Trust Fund

Tab No. 54: Local 228-Pipe Trades District No. 36 Journeyman and Apprenticeship Training Trust Fund

Tab No. 55: Local 246-Pipe Trades District No. 36 Journeyman and Apprenticeship Training Trust Fund

Tab No. 56: Apprentice and Journeymen Training Trust Fund of the Southern California Plumbing and Piping Industry

Tab No. 57: Southern California Pipe Trades District Council 16

Tab No. 58: United Association of Plumbers Local 78

Tab No. 59: Local 250-Apprentice and Journeymen Training Trust Fund of the Southern California Plumbing and Piping

Tab No. 60: UA Local 342 Joint Apprenticeship and Training Trust

Tab No. 61: UA Local 447 Joint Apprentice Training Center

Tab No. 62: Pipe Trades Apprentice and Journeyman Training Trust Fund of San Mateo County

Tab No. 63: Pipe Trades Apprentice and Journeyman Training Trust Fund of San Mateo County

Motion made to approve Tabs 53-63.

ACTION: Member Newsom moved and Member Smiles seconded the motion to approve Tabs 53-63. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **IRON-STEEL APPRENTICESHIP**

Tab No. 64: Southern California Pipe Trades District Council 16

Tab No. 65: United Association of Plumbers Local 78

Motion made to approve Tabs 64-65.

ACTION: Member Newsom moved and Member Smiles seconded the motion to approve Tabs 64-65. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **OPERATING ENGINEERS APPRENTICESHIP**

### **Tab No. 66: Joint Apprenticeship Committee for Operating Engineers, 46 Northern Counties in CA**

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Joint Apprenticeship Committee for Operating Engineers, 46 Northern Counties in CA in the amount of \$499,786. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **SURVEYORS/INSPECTORS APPRENTICESHIP**

### **Tab No. 67: Operating Engineers and Northern California Surveyors Pre-Apprenticeship, Apprenticeship and Journeyman Affirmative Action Training Fund**

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Operating Engineers and Northern California Surveyors Pre-Apprenticeship, Apprenticeship and Journeyman Affirmative Action Training Fund in the amount of \$499,960. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **STATIONARY ENGINEERS APPRENTICESHIP**

### **Tab No. 68: Stationary Engineers Northern California and Northern Nevada Apprenticeship and Training Trust Fund**

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Stationary Engineers Northern California and Northern Nevada Apprenticeship and Training Trust Fund in the amount of \$499,797. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **ELEVATOR CONSTRUCTORS APPRENTICESHIP**

### **Tab No. 69: Southern California Elevator Constructors Apprenticeship and Training Trust Tab No.70: Northern California Elevator Industry Joint Apprentice Training Committee Trust Fund**

Motion made to approve Tabs 69 & 70.

ACTION: Member Newsom moved and Member Smiles seconded the motion to approve Tabs 69 & 70. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **CARPENTERS APPRENTICESHIP**

### **Tab No. 71: Carpenters Training Trust Fund for Northern California**

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Carpenters Training Trust Fund for Northern California in the amount of \$499,892. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **FIRE SPRINKLER FITTERS APPRENTICESHIP**

### **Tab No. 73: Sprinkler Fitters Local 483 Journeyman & Apprenticeship Training Fund**

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Sprinkler Fitters Local 483 Journeyman & Apprenticeship Training Fund in the amount of \$393,188. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **TRADESHOW AND SIGN CRAFTER APPRENTICESHIP**

### **Tab No. 74: California Tradeshow and Sign Crafts Joint Apprenticeship Training Trust Fund of Painters and Allied Trades District Council 36**

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by California Tradeshow and Sign Crafts Joint Apprenticeship Training Trust Fund of Painters and Allied Trades District Council 36 in the amount of \$276,812. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

## **ROOFERS & WATERPROOFERS APPRENTICESHIP**

### **Tab No. 75: Valley Roofers Joint Apprenticeship Training Trust Fund**

ACTION: Member Newsom moved and Member Smiles seconded approval of the proposal submitted by Valley Roofers Joint Apprenticeship Training Trust Fund in the amount of \$142,449. All Panel Members present voted in the affirmative to approve the proposal as moved.

Motion carried, 6 to 0.

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

No comments were made.

#### **XIII. PUBLIC COMMENT ON MATTERS NOT ON THE AGENDA**

No comments were made.

#### **XIV. MEETING ADJOURNMENT**

Chair Bettencourt asked for motion to adjourn the panel meeting.

ACTION: Member Newsom moved and Member Smiles seconded to adjourn the panel meeting. All Panel Members present voted in the affirmative to adjourn the panel meeting as moved.

Motion carried, 6 to 0.

Chair Bettencourt Adjourned the meeting at 1:31 p.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:
  - 1) wages/benefits paid during training by participating employers;
  - 2) development, recruitment, placement, and assessment costs; and,
  - 3) facility and material expenses.
- The MEC must provide a list of participating employers to demonstrate actual employer demand for the occupational skills in the curriculum.
- The MEC must have a core group of participating employers for at least 80% of the training plan.
- Participating employers must be subject to the Employment Training Tax.
- Participating employers must demonstrate an ongoing commitment to training, and represent that ETP funds will not displace existing resources.

### *New Hire Training*

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

These features apply to core program funding.

## Delegation Order Process

- The Panel has delegated authority to the Executive Director, without consultation with the Panel Chair, to approve (1) small business (100 or fewer employees) for \$75,000 or less, and (2) single 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 October 16, 2023

cc: Peter Cooper, Assistant Director  
Jaime Gutierrez, Chief Deputy Director  
Tara Armstrong, Deputy Director/Chief Information Officer

From: Michael A. Cable, Staff Attorney

Subject: Pending Legislation; California Legislature; 2023-2024 Regular Session

---

## I. ASSEMBLY BILLS

- **AB-86 Homelessness: Statewide Homelessness Coordinator.**  
Summary: Existing law establishes various programs to address homelessness, including requiring the Governor to create an Interagency Council on Homelessness. Existing law requires the council to, among other things, identify mainstream resources, benefits, and services that can be accessed to prevent and end homelessness in California and promote systems integration to increase efficiency and effectiveness to address the needs of people experiencing homelessness. This bill would require the Governor to appoint a Statewide Homelessness Coordinator, within the Governor's Office, to serve as the lead person for ending homelessness in California.  
  
Status: On 09/01/2023-In committee: Held under submission.
- **AB-241 Vehicular air pollution; Clean Transportation Program; vehicle registration and identification plate service fees; smog abatement fee extension.**  
Summary: This bill would make various changes to the Enhanced Fleet Modernization Program, the Clean Transportation Program, and the Air Quality Improvement Program, and extend the \$20 smog abatement fee imposed on certain vehicles until January 1, 2035. This bill would take effect immediately as an urgency statute.  
  
Status: On 09/14/2023-Ordered to inactive file at the request of Assembly Member Reyes.
- **AB-437 State government: equality.**  
Summary: This bill would require state agencies and departments, in carrying out their duties, to consider the use of more inclusive practices to advance equity, as specified.  
  
Status: On 09/11/2023-Ordered to inactive file at the request of Senator Becker.

- **(VETOED) AB-469 California Public Records Act Ombudsperson.**

Summary: This bill would establish, within the California State Auditor's Office, the California Public Records Act Ombudsperson. The bill would require the California State Auditor to appoint the ombudsperson subject to certain requirements. The bill would require the ombudsperson to receive and investigate requests for review, as defined, determine whether the denials of original requests, as defined, complied with the California Public Records Act, and issue written opinions of its determination, as provided. The bill would require the ombudsperson to create a process to that effect, and would authorize a member of the public to submit a request for review to the ombudsperson consistent with that process. The bill would require the ombudsperson, within 30 days from receipt of a request for review, to make a determination, as provided, and would require the state agency to provide the public record if the ombudsperson determines that it was improperly denied. The bill would, if requested by the ombudsperson, require any state agency determined to have improperly denied a request to reimburse the ombudsperson for its costs to investigate the request for review. The bill would require the ombudsperson to create a process through which a person whose information is contained in a record being reviewed may intervene to assert their privacy and confidentiality rights, and would otherwise require the ombudsperson to maintain the privacy and confidentiality of records, as provided. The bill would require the ombudsperson to report to the Legislature, on or before January 1, 2025, and annually thereafter, on, among other things, the number of requests for review the ombudsperson has received in the prior year.

Status: On 10/07/2023-Vetoed by Governor.

- **AB-518 Paid family leave: eligibility: care for designated persons.**

Summary: This bill would expand eligibility for benefits under the paid family leave program to include individuals who take time off work to care for a seriously ill "designated person," defined as "any individual related by blood or whose association with the employee is the equivalent of a family relationship."

Status: On 09/13/2023-Ordered to inactive file at the request of Senator Durazo.

- **AB-749 State agencies: information security: uniform standards.**

Summary: This bill would require, by January 1, 2025, every state agency, as defined, to implement specified actions relating to data, hardware, software, internal systems, and essential third-party software, including multifactor authentication for access to all systems and data owned, managed, maintained, or utilized by or on behalf of the state agency. The bill would require state agencies to implement a Zero Trust architecture, as defined, and prioritize the use of solutions that comply with, are authorized by, or align to federal guidelines, programs, and frameworks. This bill would require the office's chief, no later than January 1, 2024, to develop uniform technology policies, standards, and procedures for use by all state agencies in Zero Trust architecture, including multifactor authentication, as defined, on all systems in the State Administrative Manual and Statewide Information Management Manual. The bill requires the chief to update requirements for existing annual reporting activities to collect information relating to the progress state agencies are making to increase internal defenses of agency systems. The bill would authorize the chief to update existing annual reporting activities to include how a state agency is progressing with respect to specified goals. The bill would also make related legislative findings and declarations.

Status: On 09/01/2023-In committee: Held under submission.

- **AB-1163 Lesbian, Gay, Bisexual, and Transgender Disparities Reduction Act.**  
Summary: This bill would impose the provisions of the above-described act on the Business, Consumer Services, and Housing Agency, the California Health and Human Services Agency, the Department of Housing and Community Development, and the California Commission on Disability Access, and would require these state entities to comply with the bill's provisions as early as possible following the effective date of this bill, but no later than July 1, 2025.

Status: On 09/21/2023-Enrolled and presented to the Governor at 3:30 p.m.

- **AB-1370 California Community Colleges Economic and Workforce Development Program.**  
Summary: This bill would revise and recast several provisions of the California Community Colleges Economic and Workforce Development Program. The bill would extend operation of the program indefinitely and would repeal the Job Development Incentive Training Program. The bill would revise and recast the principles governing the Economic and Workforce Development Program, provisions on the duties and membership of the program's advisory committee, the decision criteria for allocating program funds to colleges, and the definitions that apply to the program's provisions.

Status: On 09/01/2023-In committee: Held under submission.

- **(CHAPTER 133) AB-1766 Division of Occupational Safety and Health: Regulations.**  
Summary: Among other things, the bill would update statutory references within ETP's Enabling Legislation relating to the federal Workforce Innovation and Opportunity Act of 2014, the California Workforce Development Board, and local workforce development boards. Additionally, this bill would delete the statutory language declaring the intent of the Legislature that programs developed pursuant to these provisions not replace, parallel, supplant, compete with, or duplicate in any way already existing approved apprenticeship programs.

Status: On 07/27/2023-Approved by the Governor. Chaptered by Secretary of State – Chapter 133, Statutes of 2023.

## II. **SENATE BILLS**

- **(CHAPTER 196) SB-143 State government.**  
Summary: Prior to July 1, 2023, existing law authorized, subject to specified notice and accessibility requirements, a state body to hold public meetings through teleconferencing and suspended certain requirements of the act. Among other things, this bill, until December 31, 2023, would reinstate the above-described authorization for a state body to hold public meetings through teleconferencing.

Status: On 09/13/2023-Chaptered by Secretary of State. Chapter 196, Statutes of 2023.

- **SB-322 Zero-Emission Vehicle Battery Manufacturing Block Grants Program.**  
Summary: This bill would require the State Energy Resources Conservation and Development Commission, or an entity it contracts with, to administer its Zero-Emission Vehicle Battery Manufacturing Block Grant Program, and would impose eligibility, application scoring, workforce, and reporting requirements on the program. The bill would authorize the commission, or an entity it contracts with, to adopt procedures and criteria to supplement these requirements.

Status: On 09/01/2023-September 1 hearing postponed by committee.

- **(CHAPTER 199) SB-447 GO-Biz.**

**Summary:** This bill would authorize the GO-Biz to establish the Building and Reinforcing Inclusive, Diverse, Gender-Supportive Equity Project (BRIDGE Project) to promote social equity, civil rights, and anti-discrimination through marketing and advertising campaigns. The bill would also make nonsubstantive changes to these provisions.

**Status:** On 09/13/2023-Chaptered by Secretary of State. Chapter 199, Statutes of 2023.

- **(CHAPTER 890) SB-525 Minimum wage: health care workers.**

**Summary:** Among other things, this bill would require, beginning June 1, 2025, a health care worker minimum wage of \$25 per hour for hours worked in covered health care employment, as defined, subject to adjustment, as prescribed. From June 1, 2024 until June 1, 2025, the health care worker minimum wage would be \$21 per hour. The bill would provide that the health care worker minimum wage constitutes the state minimum wage for covered health care employment for all purposes under the Labor Code and the Wage Orders of the Industrial Welfare Commission. The health care worker minimum wage would be enforceable by the Labor Commissioner or by a covered worker through a civil action, through the same means and with the same relief available for violation of any other state minimum wage requirement. By establishing a new minimum wage, the violation of which would be a crime, the bill would impose a state-mandated local program.

**Status:** On 10/13/2023-Chaptered by Secretary of State. Chapter 890, Statutes of 2023.

- **SB-534 Equitable Access to Job Opportunity Pilot Program.**

**Summary:** This bill would establish the Equitable Access to Job Opportunity Pilot Program, to be operative from January 1, 2024, to January 1, 2025, inclusive, to provide individuals without postsecondary education degrees from rural or low-income communities with financial aid for workforce development training and education to gain employment in key industries. The bill would require the board and the office to administer the pilot program, including identifying key industries and developing partnerships, pathways, and opportunities to ensure local development of those industries, as specified. The bill would require the board and the office to work with local stakeholders, including local workforce development boards, in securing job opportunities and building pathways and partnerships, as specified. The bill would require the board and the office, on or before January 1, 2027, to report to the Legislature on the effectiveness of the program, as specified. The bill would repeal the bill's provisions on January 1, 2028.

**Status:** On 09/01/2023-September 1 hearing: Held in committee and under submission.

- **(CHAPTER 216) SB-544 Bagley-Keene Open Meeting Act: teleconferencing.**

**Summary:** This bill would amend existing law that will remain operative after July 1, 2023, to remove indefinitely the teleconference requirements that a state body post agendas at all teleconference locations, that each teleconference location be identified in the notice and agenda of the meeting or proceeding, and that each teleconference location be accessible to the public. The bill would require a state body to provide a means by which the public may remotely hear audio of the meeting, remotely observe the meeting, or attend the meeting by providing on the posted agenda a teleconference telephone number, an internet website or other online platform, and a physical address for at least one site, including, if available, access equivalent to the access for a member of the state body participating remotely. The bill would require any notice required by the act to specify the applicable teleconference telephone number, internet website or other online platform, and physical address indicating how the public can access the meeting remotely and in person.

**Status:** On 09/22/2023-Chaptered by Secretary of State. Chapter 216, Statutes of 2023.

- **(CHAPTER 492) SB-595 Covered California: data sharing.**

Summary: This bill would prohibit the California Health Benefit Exchange from disclosing to a certified insurance agent or a certified employment counselor personal information obtained from the Employment Development Department without the applicant's consent. The bill also would require a person or entity that receives information from the Exchange to take reasonable measures to safeguard the confidentiality of any personal information obtained from the Exchange and would prohibit a person or entity from using or disclosing that information for any purpose other than to market and publicize the availability of health care coverage through the Exchange to individuals, as directed by the Exchange.

Status: On 10/08/2023-Chaptered by Secretary of State. Chapter 492, Statutes of 2023.

- **(VETO IN SENATE) SB-822 Workforce development: Interagency High Road Act.**

Summary: This bill would require the Department of Industrial Relations and the California Workforce Development Board to collectively be responsible for oversight and decision-making, including, among other duties, creating high road evaluation metrics and developing technical assistance and evaluation infrastructure. The bill would require, upon request by a state agency, to establish interagency agreements that advance the objectives of high road procurement, contracting, and incentive programs. The bill would require, by January 1, 2025, each state agency to report to the Legislature the agency's plan to incorporate high road employment requirements in that state agency's procurement processes, contracts, and incentives programs. This bill would make these provisions effective only until January 1, 2030, and repeal them as of that date.

Status: On 10/08/2023-Vetoed go Governor. 10/08/2023- In Senate. Consideration of Governor's veto pending.

- **SB-864 Workforce development: workplace rights curriculum.**

Summary: Among other things, this bill would require the California Workforce Development Board to assist the Governor with partnering with the Labor Commissioner and other subject matter experts in developing workplace rights curricula to be provided to all individuals receiving individualized career services, supportive services, or training services through the California workforce system. The bill would require each local workforce development board to ensure the provision of workplace rights training consistent with that workplace rights curricula. The bill would require the comprehensive 4-year local plan to include a description of how the local board plans to comply with this requirement. By imposing additional duties on local workforce development boards, the bill would impose a state-mandated local program. The bill would require the California Workforce Development Board to partner with the Employment Development Department and the Labor and Workforce Development Agency to ensure that local workforce development boards and one-stop career center providers are complying with those requirements.

Status: On 09/01/2023-September 1 hearing postponed by committee.

# **ETP Audit Unit Overview & General Statistics**

**October 2023**



# ETP Audit Unit

## Audit Staff

- 1 Audit Manager – Reports Directly to Chief Deputy Director
- 5 Staff Auditors:
  - 4 Auditors Headquartered in Sacramento
  - 1 Auditor Headquartered in North Hollywood



# ETP Audit Authority

## Regulatory Authority

- The ETP Audit Unit operates off of Regulation 4448 which mandates that ETP perform performance based audits on closed contracts each fiscal year.

## Contract Language

- Section 5.6 “ETP has the right, during normal business hours, to examine or audit any and all electronic or paper records, and documents related to the delivery of services, including accounting source payroll documents, under this Contract to the extent it deems necessary. This right begins upon the effective date of this Contract, and extends to 4 years from termination of this Contract or 3 years from Fiscal Closeout or appeal resolution, whichever is later. Audits will be conducted in accordance with Generally Accepted Government Auditing Standards and may utilize statistical sampling with extrapolation of an error rate.”



# Generally Accepted Government Auditing Standards (GAGAS)

## GAGAS Summary

- ETP audits are performed under Generally Accepted Government Auditing Standards (GAGAS) which are the guidelines for audits created by the Comptroller General and the audit agency of the United States Congress, and the Government Accountability Office.

## GAGAS Requirements

- ETP Auditors are required to complete at least 80 hours of continuing professional education every 2 years.
- ETP audits are subject to Peer Reviews conducted by the Department of Finance every 3 years to ensure ETP is following GAGAS guidelines.



# Types of ETP Audits

- ETP performs two types of Audits
  - Standard Field Audit
  - Limited-scope Desk Review

## How Contracts are Selected for Audit

- Audits are selected through a judgmental and random basis.
  - Selections are often a result of multiple factors including but not limited to: contract earned amounts, monitoring, performance summaries, prior performance history, concerns raised by ETP leadership including Panel members.



# ETP Audit Reports and Appeals

- At the end of a field audit/desk review a final report is issued and the report contains a detailed analysis of any of the findings.
- If the Contractor disagrees with the audit findings they may file an appeal which is reviewed by the Legal Unit and the Executive Director.

## Goal of ETP Audits

- Obtain reasonable assurance that the performance objectives of the training contract have been met.



# ETP Audit Statistics – July 1, 2022 – Present

## Completed Audits

- 21 Audits Completed:
  - Desk Reviews = 9
  - Field Audits = 12
- Contract Type
  - SEC Audits = 14
  - MEC Audits = 7
    - JATC Audits = 4
- Geographic Area:
  - Northern California (including desk reviews) = 10
  - Southern California (including desk reviews) = 11

## Audit Statistics

- Total Earned Costs Audited (21 Contracts) = \$7,993,793.63
- Total Disallowed Costs (21 Contracts) = \$212,505.81 (3 percent)
- Average Auditor Hours per Audit = 224
- Active Audits in Progress = 23
- Audits currently being scheduled = 25



# Recurring Audit Findings

- Of the 21 Audits noted we found that these were the most common recurring issues:
  - Inaccurate reporting of trainee wage rates (13 of 21)
  - Unsupported/ineligible training hours (12 of 21)
  - Failure to meet minimum wage requirements (10 of 21)
  - Trainee was employed in an occupation not included in the Contract (7 of 21)
  - Failure to meet full-time employment requirements (6 of 21)

Thank you!





Retrainee-Job Creation  
**Training Proposal for:**  
**Agilent Technologies, Inc.**  
**Contract Number: ET24-0243**

**Panel Meeting of:** October 27, 2023

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

**Analyst:** N. Shafqat

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate	Industry Sector(s):	Manufacturing (E) Biotechnology and Life Sciences (54+)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento, Santa Clara, Santa Barbara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 2,500	U.S.: 7,500	Worldwide: 18,000
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$960,000

<b>Total ETP Funding</b>
\$499,560

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills, Continous Imp., Manufacturing Skills, HazMat	250	8–200	0–60	\$1,380	\$26.86
				Weighted Avg: 60			
2	Job Creation Initiative Priority Rate	Computer Skills, Continous Imp, Manufacturing Skills, HazMat	84	8–200	0–60	\$1,840	\$25.36
				Weighted Avg: 80			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County: Job Number 1 (Retrainee):** \$24.72 per hour for Santa Clara County; \$22.66 per hour for Sacramento and Santa Barbara counties.

**Job Number 2 (Job Creation):** \$20.60 per hour for Santa Clara County; \$18.54 per hour for Sacramento and Santa Barbara counties.

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

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

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
<b>Job Number 1 (Retrainee):</b>		
Administrators	\$26.86 - \$48.95	50
Engineers	\$27.86 - \$59.35	100
Technician	\$40.31 - \$56.40	100
<b>Job Number 2 (Job Creation):</b>		
Administrators	\$25.96 - \$48.95	10
Engineers	\$26.46 - \$59.35	30
Technician	\$25.36 - \$56.40	44

**INTRODUCTION**

Founded in 1999 and headquartered in Santa Clara, Agilent Technologies, Inc. (Agilent) ([www.agilent.com](http://www.agilent.com)) 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. The majority of the Company's research is conducted at its headquarters, and it operates two manufacturing sites in Folsom, and Carpinteria. ETP training will be delivered at its locations in Santa Clara, Folsom, and Carpinteria.

This will be Agilent's ninth ETP Contract, and its fourth in the last five years. 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 focuses on training veterans and other underserved populations and has added inclusion and diversity as one of the corporate Core Values. Agilent is also committed to cultivating an inclusive environment and increasing diversity among its workforce, which has influenced areas ranging from recruitment practices to benefit offerings and company policies. Agilent is committed to serving these individuals.

## **PROJECT DETAILS**

According to Agilent, the healthcare industry has experienced significant changes over the past several years and the recent COVID-19 pandemic has hastened the need for deeper structural changes. While conditions related to the pandemic have mostly improved year-over-year, the effects of the COVID-19 pandemic remain challenging to forecast due to numerous uncertainties. Some examples include severity, duration, resurgence of outbreaks, new variants, levels of contagion, effectiveness of health and safety measures (including vaccines and therapies), government and community responses (including future lockdowns), the pace and strength of the economic recovery, supply chain pressures, delivery and installation delays due to variable access to customer sites. Agilent will continue to actively monitor the pandemic effects and will take appropriate steps to mitigate the impacts to the employees and business.

Agilent continues to face challenges related to the development and production of commercially viable electronic measurement products that can sense, analyze, display, and communicate data for use in the life sciences, diagnostics, and chemical analysis industries. Changes in technology, production processes (including manufacturing cell lines), equipment, and/or facilities also require large capital investments and extensive workforce training. To meet the needs of patients, Agilent will continue to launch new products and manufacture it to the highest quality/reliability standards.

## **Training Plan**

Training will be conducted via Class/Lab, E-Learning, and Computer-Based Training delivery methods in the following:

**Computer Skills:** Training will be offered to all occupations on courses that include Advance Desktop Productivity Applications, Blockchain Programing, and LabView Software to increase employee skills and introduce staff to upgrades with internal software programs and systems.

**Continuous Improvement:** Training will be offered to all occupations on Leadership, Effective Teams, and Manufacturing Quality and Reliability for trainees to gain skills to implement significant improvements in productivity enhancements, decision making, corrective action, and prevention.

**Manufacturing Skills:** Training will be offered to Technicians and Engineers on Cell Analysis, Lab Automation and Robotics, and Pharmaceutical Tablet Testing Equipment to assist staff in ways to ask the right questions, how to collect the right data, and what to look for in data and outputs.

## **Certified Safety Training**

**Hazardous Materials (HAZMAT):** This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” Generally, it is a minimum of 8 hours, with a 4-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Technicians and Engineers will receive up to 8 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in an internal completion certificate that may expand employment opportunities outside of Agilent. This coursework is not under Cal-OSHA, but is administered under other regulatory agencies. There are various certification entities for the coursework and internal instructors. In this proposal, the certification entity is ISO 9001; ISO 12485; ISO 14001; and ISO27001. All ISO certifications include advanced manufacturers in the Life Sciences industry.

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

CBT will be provided to supplement Class/Lab and E-Learning, 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 \$1,250,000. Agilent funds all orientation, basic-job skills training, OSHA and FDA-mandated safety regulations, 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**

Agilent’s Director of Global Talent will oversee all project administration. Its Global Talent Development Manager (dedicated administrator) is assigned to meet and coordinate with ETP staff. Agilent will utilize its internal-training department for scheduling and training delivery. Training will be delivered by in-house Engineers and Scientists who are subject-matter experts. It has retained a third-party subcontractor- Herrera & Company to assist with ETP administration.

## **Impact/Outcome**

The funding provided by ETP will supplement, not supplant, Agilent’s corporate training budget, resulting in an increase of instructor led training with more customized curriculum to better enhance employee morale across the organization. Courses, to be delivered with ETP support, will expand trainee skills enabling them to maintain, calibrate and install electronic biotech equipment in an advanced manufacturing setting (i.e. - clean room) and to adapt to changing business requirements for regulatory and customer needs in an improved manner.

## **Electronic Recordkeeping/LMS**

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

## **Prior COVID Performance**

According to the system, Agilent’s prior COVID Pilot project (ET21-0162) with a term date of 10/5/2020 – 10/4/2022 has tracked 400 hours with the final earning of \$200,000 (100% of the \$200,000 approved amount).

**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	Potential Earnings (Based on Tracked Hours) (\$ %)
ET22-0157	\$499,100	11/22/21 – 11/21/23	345	0	0	\$499,100 (100%)

Based on ETP's Cal-E-Force system, 41,340 reimbursable hours have been tracked for potential earnings of \$499,100 (100% of approved amount). The Contractor projects final earnings of 100% based on current committed training and in progress through November 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 \$ %
ET20-0123	Sacramento, Santa Barbara, Santa Clara	9/3/19 – 9/4/21	\$749,892	\$749,892 (100%)

**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**

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

**TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**COMPUTER SKILLS**

- Advanced Desktop Productivity Applications
- Advanced eBusiness Applications
- Advanced Manufacturing Control Systems
- Advanced Manufacturing Lab Applications
- Allotrope Data Format Programming
- Blockchain Programming
- Business System Processing
- Human Resources Information Software System
- LabView Software
- Management and Manufacturing Control Systems
- Materials and Logistics Software Development
- Microsoft FLOW Application Development
- Programming Languages
- Project Management Software Tools
- Proprietary Software and Informatics
- SharePoint On-line Programming

**CONTINUOUS IMPROVEMENT**

- Advanced Product Quality and Reliability Techniques
- Design Tools and Practices
- Design for Excellence
- Leadership and Coaching Skills
- Quality Fundamentals / Core Skills
- Problem Solving Tools
- Product Transfer / Workflow
- Project Management
- Six Sigma / Green Belt
- Team Dynamics
- Technical Presentations
- Customer Communications and Awareness
- Product Knowledge and Market Validation
- Finance and Accounting Skills
- Marketing Promotion and Position
- Process Improvement Training
- Problem Solving Tools and Techniques
- Quality Fundamentals / Core Skills
- Leadership / Coaching Skills
- Effective Teams
- Facilitation Skills and Mentorship
- Strategic Sales Negotiation Techniques

**HAZARDOUS MATERIALS (HazMat Ratio 1:40)**

- Restricting of Hazardous Substances
- Risk Management and Waste Management

**MANUFACTURING SKILLS**

- Advanced Chemical Imaging Systems
- Atomic Absorption
- Atomic and Molecular Spectroscopy
- Biochemical Analyzers
- Cell Analysis
- Chemical Synthesizer Instruments
- Cryocooler Systems
- Data Analytics
- Electrophoresis Analysis Equipment
- Flow Cytometry Instruments
- Fourier Transform InfraRed Equipment
- Gas Chromatography
- Instrument Modeling/Integration Software Development
- Lab Automation and Robotics
- Laboratory Incubators, Pumps, Dryers
- Liquid Chromatography
- Liquid Handling Equipment
- Mass Spectrometers
- Measurement Sciences Practice and Theory
- Microarray Imaging Microscopes
- Microplate Instrumentation
- Oxygen Measurement Instruments
- Particle Analysis and Characterization Systems
- Pharmaceutical Tablet Testing Equipment
- Technical Qualifications and Certifications
- Testing and Troubleshooting Skills
- System Data Modeling and Architecture
- Vacuum Technology

**Computer-Based Training****COMPUTER SKILLS**

- Advanced Desktop Applications (2 hrs.)
- Customer Relationship Management Systems (1 hr.)
- Management and Manufacturing Control Systems (4 hrs.)
- Materials and Logistics Software Development (6 hrs.)
  - Business Intelligence (2 hrs.)
  - Data Analytics (2 hrs.)
  - Introduction to Logistics (1 hr.)
  - Systems Integration (1 hr.)
- Operating System Programming Language (1 hr.)
- Programming Languages (1 hr.)

- Project Management Software Tools (1 hr.)
- Single-Vendor Enterprise Resources Planning (1 hr.)

### **CONTINUOUS IMPROVEMENT**

- Business Excellence and Finance (6 hrs.)
  - Capital Budgeting (1 hr.)
  - Decision Making (1 hr.)
  - Financial Risk Management (1 hr.)
  - Financial Statement Analysis (1 hr.)
  - Socially Responsible Investing (1 hr.)
  - Working Capital Management (1 hr.)
- Customer Communications and Awareness (3 hrs.)
- Effective Teams (4 hrs.)
- Facilitation Skills and Mentorship (1 hr.)
- Finance and Accounting Skills (1 hr.)
- Leadership / Coaching Skills (3 hrs.)
- Manufacturing Quality and Reliability (1 hr.)
- Manufacturing Procedures and Protocols (2 hrs.)
- Marketing Promotion and Position (2 hrs.)
- Process and Capability Mapping (1.5 hrs.)
- Problem Solving Tools and Techniques (4 hrs.)
- Production System Procedure Review (1 hr.)
- Process Improvement Training (3 hrs.)
- Product Knowledge and Market Validation (5 hrs.)
  - Customer Segments (1 hr.)
  - Competitive Analysis (1 hr.)
  - Sales Techniques and Strategies (1 hr.)
  - Value Proposition (2 hrs.)
- Quality Management Systems (QMS) Procedures (1 hr.)
- Quality Fundamentals/Core Skills (1 hr.)
- Strategic Sales Negotiation Techniques (1 hr.)
- Sales and Negotiation Skills (1 hr.)
- Technical Presentations (1.5 hrs.)



Retrainee-Job Creation  
**Training Proposal for:**  
**Alpha Mechanical, Inc.**  
**Contract Number: ET24-0242**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** San Diego

**Analyst:** S. Phillips

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SET Job Creation Initiative	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 125	U.S.: 125	Worldwide: 125
<u>Turnover Rate:</u>	17%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$160,522

<b>Total ETP Funding</b>
\$157,550

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Commercial Skills, Business Skills, Computer Skills, Continuous Improvement, HAZMAT HAZWOPER OSHA 10/30	125	8-200	0	\$1,150	\$30.90
				Weighted Avg: 50			
2	Retrainee SET Job Creation Initiative Priority Rate	Commercial Skills, Business Skills, Computer Skills, Continuous Improvement, HAZMAT HAZWOPER OSHA 10/30	10	8-200	0	\$1,380	\$18.54
				Weighted Avg: 60			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1 (Retrainee – SET): \$30.90 per hour; Job Number 2 (Retrainee - Job Creation): \$18.54 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 for Job Number 1.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 - Retrainee</b>		
Administrative Staff	\$28.40-\$34.00	20
Managers/Supervisors	\$30.00-\$40.00	5
Technicians	\$28.40-\$36.00	100
<b>Job Number 2 – Job Creation</b>		
Technicians	\$18.54-\$20.00	5
	\$20.01-\$22.00	5

**INTRODUCTION**

Founded in 1991, Alpha Mechanical, Inc. (Alpha Mechanical), specializes in HVAC construction, design-build controls and tenant improvement. The Company also operates as a plumbing contractor, and does work in process piping, energy efficiency retrofits, and mechanical equipment service & maintenance.

Customers include Educational Institutions, military bases, and a wide variety of research, healthcare, commercial, and industrial businesses.

This will be the Company's first ETP contract. Training will take place at its San Diego location.

### **Veterans Program**

Alpha Mechanical has partnered with the Veterans Administration to recruit Veterans and fill open positions. The Company is not requesting a separate job number at this time.

### **PROJECT DETAILS**

Alpha Mechanical operates in a competitive industry, which changes annually due to the advancements and innovation in technology. Clients want improved communication, job evaluation, technological innovation and efficiency and the integration of software and advanced technology. As such, the Company has to work hard to compete for both jobs and talent necessary to maintain a skilled workforce that can complete jobs based on customers' unique demands. To that end, training is crucial to Alpha Mechanical's vitality, growth and employee satisfaction to create an environment where creativity can thrive and benefit all.

Over the course of the next year, the Company will invest funding on improvements to current software and hardware platforms for engineering analysis, energy modeling, building information systems and project information management. These upgrades will assist with efficiency and quality improvements in all facets of the project delivery process, ensuring cost effective results for clients. In addition, Alpha Mechanical plans to spend additional funds upgrading its Workflow systems to increase communication between the field, the office, and clients. With a higher demand for results and budget conscious clients, the Company must streamline the production process and increase the project management skills of Technicians and support staff.

As industry standards change, training is needed to continue to stay current in these evolving standards. The goal is to train managers and technicians to service new and current clients with an innovative and sustainable approach to differentiate the Company from its competition.

### **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 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 and E-Learning in the following:

**Business Skills:** This training will be delivered to all occupations. Training will include, Business Case Analysis and Development, Business Development, Business Partnering, Contract Administration, Interpersonal Communication, Leadership Skills, Project Management, and Work Procedures.

**Commercial Skills:** This training will be offered to Managers/Supervisors as well as Technicians. Training will include Blueprint Reading, Construction Procedures, Direct Digital Control, Energy Saving, Field Operational Procedures, Heating Ventilation Air Conditioning, Leadership Energy Environmental Design, Lighting Systems Automated Controls, Maintenance, Plumbing, Process Piping, and Site Management.

**Computer Skills:** This training will be delivered to all occupations. Training will include Adobe Acrobat, Autodesk Building Design Premium, AutoCAD LT, AutoCAD MEP, Building Design Suite, Fabrication CADmep, Fabrication CAMduct, Google Earth/Mapping Tools, HAZMap, Microsoft Office (Intermediate/Advanced), Primavera, Prolog, SMARTS System, Storm Water Management Pollution Prevention Plan, and REVIT MEP 2012. A full list of topics can be found on the Menu Curriculum attached to this proposal.

**Continuous Improvement:** This training will be delivered to all occupations. Training will include Goal Setting, Meeting Management, Planning, Process Improvement and Quality Improvement.

### **Certified Safety Training**

1. OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
2. Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom 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. Trainees will not receive 40 hours unless they work full time onsite at the clean-up location.
3. Hazardous Materials (HAZMAT). This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Managers/ Supervisors and Technicians will receive up to 20 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 is CalTrans.

### **Commitment to Training**

Alpha Mechanical currently has an annual training budget of \$100,000 in San Diego County. Current training includes AutoCAD certification as well as continuous improvement training for incumbent staff.

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 HR Administrator will oversee the overall project. The HR Administrator will coordinate training and ensure that training is documented according to ETP rules and regulations. Training will be delivered by subject matter experts and outside training vendors when necessary. The Company has also retained a third party administrator to assist with project administration.

**Impact/Outcome**

As noted above, with the assistance of ETP funds, Alpha Mechanical will invest funds in improvements to the current software and hardware platforms for engineering analysis, energy modeling, building information systems and project information management. These upgrades will assist with efficiency and quality improvements to ensure that workers can respond to customer demands whilst on the job. In addition, the Company plans to spend additional funds upgrading Workflow systems to increase communication between the field, the office, and customers. With a higher demand for results and budget conscious customers, the goal is to streamline production processes and increase the project management skills of engineers and support staff.

**DEVELOPMENT SERVICES**

The Company retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of \$1,900.

**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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Business Case Analysis and Development
- Business Development
- Business Partnering
- Contract Administration
- Interpersonal Communication
- Leadership
- Project Management
- Public Sector Finance, Government and Accountability
- Time Management
- Service Costing and Financial Modeling
- Writing
- Work procedures

**Commercial Skills**

- Blueprint Reading
- Construction procedures
- Direct Digital Control
- Energy saving
- Field Operational procedures
- Heating Ventilation Air Conditioning (HVAC)
- Leadership Energy Environmental Design (LEED)
- Lighting systems automated controls
- Maintenance
- Plumbing
- Process Piping
- Site Management

**Computer Skills**

- Adobe Acrobat
- Autodesk Building Design Premium (Alpha)
- AutoCAD LT (Alpha)
- AutoCAD MEP (Alpha)
- Building Design Suite
- Fabrication CADmep
- Fabrication CAMduct
- Google Earth / Mapping Tools
- HazMap
- Microsoft Office (Intermediate/ Advanced)
- Primavera
- Prolog
- SMARTS system
- Storm Water Management Pollution Prevention Plan (SWPPP)

- Timberline
- WaterCAD
- Water Quality Management Plan (WQMP)
- Windows 7
- WSPG
- xpSWMM
- AutoCAD 2012 Civil 3D
- Architectural Desktop
- NavisWorks-ACAD
- REVIT MEP 2012

**Continuous Improvement Skills**

- Goal Setting
- Meeting Management
- Planning
- Process improvement
- Quality Improvement

**Hazardous Materials Skills**

- Hazardous Material handling

**HazWoper**

- Hazwoper

**OSHA 10 (Certified-OSHA Instructor)**

- OSHA 10

**OSHA 30 (Certified-OSHA Instructor)**

- OSHA 30



Retrainee-Job Creation

Training Proposal for:

**Axelgaard Manufacturing Co., Ltd**

**Contract Number: ET24-0262**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** San Diego

**Analyst:** L. Hughes

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 120	U.S.: 120	Worldwide: 128
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	13%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$170,523

<b>Total ETP Funding</b>
\$140,300

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comp. Skills, Cont. Impr., MFG Skills, , PL - MFG Skills	110	8-200	0	\$1,150	\$22.66
				Weighted Avg: 50			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Comp. Skills, Cont. Impr., MFG Skills, , PL - MFG Skills	10	8-200	0	\$1,380	\$18.54
				Weighted Avg: 60			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1 (Retrainee): \$22.66 per hour; Job Number 2 (Job Creation): \$18.54 per hour in San Diego County.

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage For Job Number 1 and up to \$0.54 per hour for Job Number 2.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee)</b>		
Supervisor/Manager	\$20.16 - \$25.00	1
	\$25.01 - \$40.00	14
Administration	\$20.16 - \$25.00	2
	\$25.01 - \$26.00	18
Quality Control	\$20.16 - \$25.00	1
	\$25.01 - \$30.00	4
Manufacturing Staff	\$20.16 - \$25.00	4
	\$25.01 - \$26.00	66
<b>Job Number 2 (Job Creation)</b>		
Manufacturing Staff	\$18.00 - \$20.00	1
	\$20.01 - \$25.00	1
	\$25.01 - \$26.00	8

## **INTRODUCTION**

Founded in 1985, and headquartered in Fallbrook, CA Axelgaard Manufacturing Co., Ltd (AMC) (<https://www.axelgaard.com/>), designs, develops, and produces patented electrodes and hydrogels, as well as custom and specialty products. AMC also offers a wide variety of products for medical and therapeutic use ranging from multi-purpose adhesives to custom items. They manufacture a variety of electrodes, including iontophoretic buffered return electrodes with varying levels of performance and value to control and optimize electrical current.

All AMC products are manufactured in the United States and sold throughout the world. Its customers include both commercial and private; health care, medical, and clinical clients. Training will take place at their four locations in Fallbrook, CA. This will be the company's first ETP project.

### **Veterans Program**

While the Company does not have a formal targeted Veteran program, the Company encourages Veterans to apply for open positions. Veterans are given special consideration when they apply for jobs with the Company.

## **PROJECT DETAILS**

To remain competitive in the manufacturing industry, AMC has identified three key business needs. First, they must enhance workforce skills to meet the demands of automation. This involves upskilling Manufacturing Staff from "unskilled" to "semi-skilled" or "technician" levels to operate, maintain, and troubleshoot automated equipment. Secondly, AMC plans to increase automation in manufacturing and business processes through investments in facility upgrades, hardware, and software enhancements. This will improve efficiency and reduce costs, enabling them to compete with lower-cost overseas manufacturers. Lastly, AMC aims to introduce new product lines in the electrode pad and hydrogel areas, accompanied by enhanced communication about the advancements of these products to maximize customer satisfaction.

To address the skill gap and support automation initiatives, AMC's training program will encompass both computer and manufacturing skills. Manufacturing Staff will receive training in process improvement, computerized inventory, assembly skills, and work instructions. Additionally, newly hired Manufacturing Staff will learn mixing, casting, printing, knitting, and coating techniques. Operators will be trained in basic equipment cleaning procedures, previously handled by maintenance personnel, along with log out tag out procedures and proper equipment cleaning steps.

### **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 expects to hire 10 new Manufacturing Staff (Job Number 2) to meet the following business needs:

- Increased customer demand for lead wires that are assembled manually. As this trend increases, additional manufacturing staff will be needed.
- Expansion to a third gel line.

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 delivery methods in the following:

**Business Skills:** Training will be offered to all occupations and will include: Business Reports, Organizational Skills, Process Improvement, and Planning & Time Management.

**Computer Skills:** Training will be offered to all occupations and will include: Computer Aided Design, Computerized Inventory, Electronic Medical Records Application Skills, Invoice Software, and Report Generating Software.

**Continuous Improvement:** Training will be offered to all occupations and will include: Documentation Control, Client Education, Risk Analysis, Leadership Skills, and Total Quality Management.

**Manufacturing Skills:** Training will be offered to all occupations and will include: Advanced Failure Analysis Procedures, Work Instructions, Assembly Skills, Component Fabrication, Design Standards & Processes, UltraStim® Electrodes, PALS® Neurostimulation Electrodes and MultiStick® Hydrogel.

## Productive Laboratory

Trainees may produce goods for profit as part of the PL training in the courses identified in the Curriculum. The instructor must be dedicated to training delivery during all hours of training. Trainees will be under direct trainer supervision at all times. The trainer will impart knowledge, observe, verify comprehension, and submit appropriate training documentation.

As an effective training method, AMC is requesting ETP funds to train approximately 80 Manufacturing Staff. Proposed PL hours are 0-12 PL hours for Job Number 1 (Retrainees) and 0-15 PL hours for Job Number 2 (Job Creation) for the following equipment: Mixing equipment, casting equipment, Dusenbury, extruCder, knitting machine, printing and coating machines, ELAM, ROTO, material handling equipment, bagging/packaging machines, and inspection equipment. Training will be conducted on the shop floor with a trainer-to-trainee ratio of 1:1.

## Commitment to Training

AMC has an annual training budget of \$100,000. Current training includes Laboratory Applications, Risk Analysis, and Work Instructions. With the assistance of ETP funds, AMC will continue its expansion plans and invest in upskilling its workforce. This will ensure that the company can continue to meet customer demands and industry standards.

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

This project has support from the Regulatory Affairs Manager of the company, who will oversee the project with the assistance of the HR Manager. The company will meet monthly to strategize and ensure it is in compliance with ETP rules and regulations. The Vice President, HR Manager, along with 10 to 15 department leads will coordinate and supervise the delivery of training. Training instructors include a combination of subject matter experts, managers, and department leads. The facility and operations manager at each location will coordinate training together. AMC has a detailed training plan in place to ensure training is delivered consistently. The company has also retained an administrative third party to assist with project administration.

**Impact/Outcome**

ETP funding will assist AMC in its ability to expand on basic skills for new employees. ETP funding will also allow the Company to add specific and targeted training for retrainee staff, necessary for upskilling and upward mobility within the Company. This will allow AMC to meet the demand of new and existing customers while expanding employees' skills and earning potential.

**Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

**DEVELOPMENT SERVICES**

Training Funding Source in Seal Beach, assisted with development of this proposal for a flat fee of \$1,900.

**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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Business Reports
- Coaching and Mentoring
- Communication Skills
- Customer Service Skills
- Organizational Skills
- Performance Management Skills
- Planning & Time Management
- Problem Solving
- Process Improvement
- Product Knowledge
- Project Management
- Strategic Business Operations
- System Demonstration Procedures
- Teambuilding Skills
- Technical Writing
- Technological Knowledge

**Computer Skills**

- Computer Aided Design
- Computer Security
- Computer-Assisted Engineering
- Computerized Inventory
- Imaging Applications
- Invoice Software
- Laboratory Applications
- Microsoft Office (Intermediate/Advanced)
- Report Generating Software

**Continuous Improvement Skills**

- Documentation Control
- Change Management Skills
- Client Education
- Conflict Management
- Decision-Making Skills
- Leadership Skills
- Leading Teams
- Risk Analysis
- Work Instructions
- Total Quality Management

**Manufacturing Skills**

- Advanced Failure Analysis Procedures
- Assembly Skills
- Component Fabrication
- Design Standards & Processes
- Device Identification Procedures
- Equipment Maintenance
- Facility Standards
- Image-guided Navigation
- Product Inspection Techniques
- Inventory Management
- Laboratory Operations
- Product Installation
- Quality Control
- Work Instructions
- UltraStim® Electrodes
- PALS® Neurostimulation Electrodes
- MultiStick® Hydrogel

**Safety Training:**

- Lock Out Tag Out
- Hazardous Waste
- Chemical Handling
- Material Handling
- Respiratory Training
- First Aid/CPR

**Productive Lab (Trainer-to-Trainee Ratio 1)**

Trainees may receive any of the following:

**Manufacturing Skills**

- Failure Analysis Procedures
- Assembly Skills
- Component Fabrication
- Design Standards & Processes
- Device Identification Procedures
- Equipment Maintenance
- Quality Control Inspection Techniques
- Laboratory Operations
- Work Instructions



Retrainee-Job Creation

**Training Proposal for:**

**Boehringer Ingelheim Fremont, Inc.**

**Contract Number: ET24-0227**

**Panel Meeting of:** October 27, 2023

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

**Analyst:** N. Shafqat

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing (E) Biotechnology and Life Sciences (54+)	
			Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 880	U.S.: 8,500	Worldwide: 53,000	
<u>Turnover Rate:</u>	6%			
<u>Managers/Supervisors:</u> (% of total trainees)	0%			

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$960,000

<b>Total ETP Funding</b>
\$499,560

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills, Cont. Improv., HazMat, Manufacturing Skills, PL-Manufacturing Skills	423	8-200	0-61	\$920	\$26.86
				Weighted Avg: 40			
2	Job Creation Initiative Priority Rate	Computer Skills, Cont. Improv., HazMat, Manufacturing Skills, PL-Manufacturing Skills	60	8-200	0-61	\$1,840	\$25.16
				Weighted Avg: 80			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County: Job Number 1:** \$24.72 per hour for Alameda County.

**Job Number 2 (Job Creation):** \$20.60 per hour for Alameda County.

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

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

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
<b>Job Number 1: Retrainee</b>		
Administrator	\$26.86 - \$48.95	23
Production Operator	\$27.86 - \$56.40	300
Engineers	\$40.31 - \$59.35	100
<b>Job number 2: Job Creation</b>		
Administrator	\$25.16 - \$48.95	10
Production Operator	\$26.46 - \$56.40	40
Engineer	\$37.36 - \$59.35	10

**INTRODUCTION**

Founded in 1885 in Germany and headquartered in Fremont, Boehringer Ingelheim Fremont, Inc. (BIFI) is a subsidiary of the family-owned parent corporation Boehringer Ingelheim, a research-based biopharmaceutical company that discovers, develops, and manufactures medicines for human and animal health. BIFI is an arm of Boehringer Ingelheim's biopharmaceutical division; it utilizes advanced biopharmaceutical manufacturing technology to produce monoclonal antibodies. These biologic therapies are used to treat millions of people living with hard-to-treat diseases, such as cancer and chronic inflammatory disorders. Some of BIFI's largest clients include clinical and non-clinical markets, consisting of hospitals, health clinics, research labs, and other health care institutions. ETP training will occur at its headquarters and sole location in Fremont.

This will be BIFI's third ETP Contract, and its third within the last five years. In the previous project, training focused on new equipment and on new technology-based skill upgrades (software, manufacturing processes and ISO). In this proposal, training will be provided to frontline manufacturing, administrative and engineering staff involved in research, production, quality control, and computer upgrades. The training will focus on processes for increased capacities and efficiencies; eliminating waste; educating employees on LEAN principles and Food Product Safety; new product manufacturing technologies; and continuous improvement techniques.

### **Veterans Program**

Even though the Company is not requesting a separate Veteran's Job Number, BIFI is committed to hiring and retaining veterans through local recruiting firms. Veterans will be sought out through agencies and organizations locally for hiring opportunities.

### **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 has committed to hiring 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. 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, BIFI's Fremont facility is expanding while focusing on transitioning into a commercial operation and manufacturing both its own products as well as external products as a contract manufacturer. According to company representatives, the development, design, and manufacture of its products is complex, requiring an elevated degree of technical knowledge from its employees. Due to the specialized, scientific nature of its business, the Company places considerable reliance on hiring and retraining qualified engineering, technical, and manufacturing personnel. The addition of 60 full-time positions will also contribute to the state's economic development effort by growing the life sciences sector.

## **PROJECT DETAILS**

BIFI recently completed its multi-million dollar investments to upgrade and expand its Fremont manufacturing facility. This investment increased its manufacturing capacity and allowed overall business capacity to grow in California. These investments brought in new equipment including a third bioreactor and other advanced manufacturing technologies including automated pack/fill systems and high-tech analytical tools that require additional training on upgraded equipment and processes. ETP training will assist BIFI expand its markets, grow its workforce in California, and remain competitive globally.

### **Training Plan**

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

**Computer Skills:** this training will be offered to all occupations on topics that include Advanced Desktop Applications, Materials and Logistics Software Development, and Project Management Software Tools to increase efficiency and remain competitive. Training will focus on advanced levels of computer-assisted design (CAD) software, advanced manufacturing control systems, technical lab applications and personal productivity software applications.

**Continuous Improvement:** this training will be offered to all occupations on topics that include Customer Communications and Awareness, Facilitation Skills and Mentorship, and Strategic Sales Negotiation Techniques to drive compliance and quality performance throughout the organization. Trainees will learn techniques to reduce costs, improve teamwork, become more effective as employees, and improve problem solving. A key goal is to institutionalize Good Manufacturing Practices (GMP) to ensure that BIFI's products meet specific requirements for identity, strength, quality, and purity.

**Manufacturing Skills:** this training will be offered to all occupations in topics that include Biochemical Analyzers, Lab Automation and Robotics, Chemical Synthesizer Instruments, and Single-Use Bioreactors to ensure BIFI's front-line manufacturing workforce remains efficient in advanced biopharmaceutical manufacturing tools and equipment used in the making of products.

### **Certified Safety Training**

1. Hazardous Materials (HAZMAT). This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." Generally, it is a minimum of 24 hours, with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Production Operator will receive up to 8 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 other regulatory agencies. There are various certification entities for the coursework and instructors. In this proposal, the certification entity is ISO 9001, 12485, 14001, and 27001.

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

CBT will be provided to supplement Class/Lab and E-Learning which is a more convenient means of delivering basic training. Trainees will receive between 0–61 hours of CBT. CBT will be provided to all occupations in Computer Skills and Continuous Improvement. This training will allow employees to take courses at their own pace without instructor interaction.

### **Productive Laboratory (PL - Manufacturing Skills)**

The Panel has adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory setting. BIFI's 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.

Ten hours per trainee for Job Number 1 (Retrainee) and 20 hours per trainee for Job Number 2 (Job Creation) of PL training will be provided to 340 Production, who are the frontline manufacturing associates and who directly interface with improved manufacturing processes and new equipment. The proposed PL training will provide cross-training opportunities on the many production lines/procedures used throughout the manufacturing facility. All PL training will occur in a cleanroom manufacturing setting conducted by a qualified trainer.

During ETP-funded training, the trainer's time will be dedicated to the delivery of PL to the trainee. The trainer-to-trainee ratio for all PL training will be 1:1. Manufacturing skills training will be taught by a combination of highly skilled internal production supervisors/trainers, technicians, and engineers. Trainees observe real production procedures demonstrated by the lab trainer and will practice their skills under the supervision of the trainer. Upon certification of their competency, trainees can independently produce goods that are for sale. PL training certificates and

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

### **Commitment to Training**

The Company's statewide training expenditure in California for non-ETP related training is in excess of \$960,000. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### **➤ Training Infrastructure**

BIFI's Manager, Employee Training and Development (dedicated administrator) will oversee the project. Training will be administered under the Company's training department, which will oversee the workforce training across the organization and operates under the direction of a Vice President. Training will be delivered by in-house trainers who are subject-matter experts and by training vendors on a case-by-case basis. Additionally, it has hired a third-party subcontractor, Herrera & Company, to assist with ETP administration and staff.

### **Impact/Outcome**

With ETP funds, training will expand trainee skills enabling them to operate biotech machines in an advanced biotech manufacturing setting (i.e. - clean room) and to adapt to changing business requirements for regulatory and customer needs in an improved manner. The Company's employees will attain documented certification of competency for each significant manufacturing tool and/or procedure they learn which will expand their promotional and career opportunities. The resources provided by ETP will supplement BIFI's training budget by helping the Company to further its efforts to deliver more and better-quality training. ETP funds will also enhance and encourage ongoing financial commitment in workforce training and provide transferrable employment skills to other life sciences companies in California

### **Electronic Recordkeeping/LMS**

BIFI requests the use of a LMS, Plateau, developed by SAP as a form of Electronic Training Recordkeeping system to document all ETP training. The system has been in use for ten years and documents the hours and dates of training both automatically and manually based on self-paced or instructor-led training. These recordings are dependent on training attendance documents completed by the trainer. A standard hour's allocation is assigned to each CBT course and is credited to employees who complete 100% of the course content and pass a post-course quiz with a score of 80% or greater. The records are maintained and accessible by ETP for up to 30 years. ETP staff has reviewed and approved this LMS.

## **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	Potential Earnings (Based on Tracked Hours) (\$ %)
ET22-0261	\$499,100	3/28/22 – 3/27/24	345	640	640	\$499,100 (100%)

Based on ETP's Cal-E-Force (CEF) system, 46,541 reimbursable hours have been tracked for potential earnings of \$499,100 and all enrollees have completed 90 days of post-training employment (100% of approved amount). The Contractor projects final earnings of 100% based on overall performance through June 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 \$ %
ET19-0143	Fremont	10/3/18 – 10/4/20	\$899,522	\$898,743 (99%)

## **DEVELOPMENT SERVICES:**

BIFI retained Herrera & Company in Stockton to assist with the 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**COMPUTER SKILLS**

- Advanced Desktop Productivity Applications
- Advanced eBusiness Applications
- Advanced Manufacturing Control Systems
- Advanced Manufacturing Lab Applications
- Allotrope Data Format Programming
- Blockchain Programming
- Business System Processing
- Human Resources Information Software System
- LabView Software
- Management and Manufacturing Control Systems
- Materials and Logistics Software Development
- Microsoft FLOW Application Development
- Programming Languages
- Project Management Software Tools
- Proprietary Software and Informatics
- SharePoint On-Line Programming

**CONTINUOUS IMPROVEMENT**

- Advanced Product Quality and Reliability Techniques
- Design Tools and Practices
- Design for Excellence
- Leadership and Coaching Skills
- Quality Fundamentals / Core Skills
- Problem Solving Tools
- Product Transfer / Workflow
- Project Management
- Six Sigma / Green Belt
- Team Dynamics
- Technical Presentations
- Customer Communications and Awareness
- Product Knowledge and Market Validation
- Finance and Accounting Skills
- Marketing Promotion and Position
- Process Improvement Training
- Problem Solving Tools and Techniques
- Quality Fundamentals / Core Skills
- Leadership / Coaching Skills
- Effective Teams
- Facilitation Skills and Mentorship
- Strategic Sales Negotiation Techniques

**HAZARDOUS MATERIALS (HazMat) 1:40 Ratio**

- Restricting of Hazardous Substances
- Risk Management and Waste Management

**MANUFACTURING SKILLS**

- Advanced Chemical Imaging Systems
- Atomic Absorption
- Atomic and Molecular Spectroscopy
- Biochemical Analyzers
- Cell Analysis
- Chemical Synthesizer Instruments
- Cryocooler Systems
- Data Analytics
- Electrophoresis Analysis Equipment
- Flow Cytometry Instruments
- Fourier Transform InfraRed Equipment
- Gas Chromatography
- Instrument Modeling / Integration Software Development
- Lab Automation and Robotics
- Laboratory Incubators, Pumps, Dryers
- Liquid Chromatography
- Liquid Handling Equipment
- Mass Spectrometers
- Measurement Sciences Practice and Theory
- Microarray Imaging Microscopes
- Microplate Instrumentation
- Oxygen Measurement Instruments
- Particle Analysis and Characterization Systems
- Pharmaceutical Tablet Testing Equipment
- Technical Qualifications and Certifications
- Testing and Troubleshooting Skills
- System Data Modeling and Architecture
- Vacuum Technology

**Productive Lab (Trainer-to-Trainee Ratio 1:1)****PL- MANUFACTURING SKILLS**

- Aseptic Filling Systems
- Automated Liquid Handling Systems
- Bioreactor Additions Cabinet Usage
- Bioreactor to Bioreactor Line CIP
- Bioreactor Transfer
- Bioreactors
- Cell Disruption Systems
- Centrifuges
- Chromatography Systems
- Clarifying Filter Quality Control Biochemistry
- Continuous Fermenters
- Counting - Cart CIP and Operations
- Culture Quality Control Chemistry
- Dial Thermometer / Temperature
- Dissolved Oxygen Transmitters
- Endotoxin Testing QC Chemistry
- Fermentation Systems

- Filtration Systems
- Fixed Rosemount Cart Operation
- Fixed Tanks-Media pH Transmitter and pH Probe
- Force Indicators
- Freeze Dryers
- Freezing of Magnetic Mixer
- Gas Detectors And Analyzers
- Gas Flow Indicators / Transmitters
- Homogenizers
- Humidity Indicators / Transmitters
- Identification of Airborne Viable Particulates
- Incubators
- Industrial Field Timing Devices
- Laboratory Centrifuges
- Level Indicators / Transmitters
- Level Switches
- Lyophilizes
- Media Filter Cart CIP
- Protein Purification Systems
- Purification Systems
- Single-Use Bioreactors
- Sonicators
- Stirred-Tank Bioreactors
- Tangential Flow Filtration Systems
- Ultrafiltration Systems

### **Computer-Based Training**

#### **COMPUTER SKILLS**

- Advanced Desktop Applications (2 hrs.)
- Customer Relationship Management Systems (1 hr.)
- Management and Manufacturing Control Systems (4 hrs.)
- Materials and Logistics Software Development (6 hrs.)
  - Business Intelligence (2 hrs.)
  - Data Analytics (2 hrs.)
  - Introduction to Logistics (1 hr.)
  - Systems Integration (1 hr.)
- Management and Manufacturing Control Systems (1 hr.)
- Operating System Programming Language (1 hr.)
- Programming Languages (1 hr.)
- Project Management Software Tools (1 hr.)
- Single-Vendor Enterprise Resources Planning (1 hr.)

#### **CONTINUOUS IMPROVEMENT**

- Business Excellence and Finance (6 hrs.)
  - Capital Budgeting (1 hr.)
  - Decision Making (1 hr.)
  - Financial Risk Management (1 hr.)
  - Financial Statement Analysis (1 hr.)
  - Socially Responsible Investing (1 hr.)
  - Working Capital Management (1 hr.)
- Customer Communications and Awareness (3 hrs.)

- Effective Teams (4 hrs.)
- Facilitation Skills and Mentorship (1 hr.)
- Finance and Accounting Skills (1 hr.)
- Leadership / Coaching Skills (3 hrs.)
- Manufacturing Quality and Reliability (1 hr.)
- Manufacturing Procedures and Protocols (2 hrs.)
- Marketing Promotion and Position (2 hrs.)
- Process and Capability Mapping (1.5 hrs.)
- Problem Solving Tools and Techniques (4 hrs.)
- Production System Procedure Review (1 hr.)
- Process Improvement Training (3 hrs.)
- Product Knowledge and Market Validation (5 hrs.)
  - Customer Segments (1 hr.)
  - Competitive Analysis (1 hr.)
  - Sales Techniques and Strategies (1 hr.)
  - Value Proposition (2 hrs.)
- Quality Management Systems (QMS) Procedures (1 hr.)
- Quality Fundamentals / Core Skills (1 hr.)
- Strategic Sales Negotiation Techniques (1 hr.)
- Sales and Negotiation Skills (1 hr.)
- Technical Presentations (1.5 hrs.)



Retrainee-Job Creation

**Training Proposal for:**

**California Manufacturing and Engineering Co., LLC**

**Contract Number: ET24-0258**

**Panel Meeting of:** October 27, 2023

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

**Analyst:** N. Shafqat

**PROJECT PROFILE**

Contract Attributes:	HUA Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing   Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 191	U.S.: 197	Worldwide: 197
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	5%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$200,000

<b>Total ETP Funding</b>
\$191,429

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee HUA Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Impr., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	182	8-200	0	\$943	\$18.00
				Weighted Avg: 41			
2	Job Creation Initiative HUA Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Impr., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	21	8-200	0	\$943	\$18.00
				Weighted Avg: 41			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1 (HUA): \$17.00 per hour for Fresno County  
Job Number 2 (Job Creation/HUA): \$15.50 per hour for Fresno County

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

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

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

Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff	\$18.00 - \$20.00	5
	\$20.01 - \$25.00	4
	\$25.01 - \$33.65	7
Engineers	\$25.00 - \$52.88	5
Customer Service	\$18.00 - \$20.00	7
	\$20.01 - \$25.00	2
	\$25.01 - \$44.84	7
Managers	\$25.00 - \$63.46	10
Operations	\$18.00 - \$20.00	57
	\$20.01 - \$25.00	26
	\$25.01 - \$36.34	8

Quality Control	\$18.00 - \$20.00	10
	\$20.01 - \$25.00	1
	\$25.01 - \$30.28	1
Sales Staff	\$25.00 - \$37.44	2
Shipping and Warehouse Staff	\$18.00 - \$20.00	25
	\$20.01 - \$25.00	4
	\$25.01 - \$33.31	1
<b>Job Number 2</b>		
Customer Service	\$18.00 - \$20.00	2
	\$20.01 - \$25.00	1
Operations	\$18.00 - \$20.00	10
	\$20.01 - \$25.00	2
Quality Control	\$18.00 - \$19.99	2
Shipping and Warehouse Staff	\$18.00 - \$20.00	3
	\$20.01 - \$25.00	1

## **INTRODUCTION**

Founded 2004 and headquartered in Kerman, California Manufacturing and Engineering Co., LLC (CMEC) (<https://www.mecawp.com/>) is a manufacturer of heavy construction machinery and equipment focused on mobile elevating platforms that include aerial work platforms, telescopic handlers, scissors, boom lifts, and 2-wheel steer controls. The Company provides specialty and aerial lift products to various rental companies at reasonable prices. CMEC has another location in Fresno, however, ETP training will be provided at its headquarters' location in Kerman only.

This is CMEC's first ETP Contract. In this proposal, the Company is focused on increasing productivity and enhancing quality control by providing more comprehensive manufacturing and warehouse training to improve performance. Training will include forklift, assembly procedures, changeover procedures, equipment operation, inventory control, machine maintenance, production operations, sales/marketing, research/development, diversification of product lines, new market penetration, increasing efficiencies on all fronts, and other essential topics for workforce development of future employees.

### **Veterans Program**

Although there is no Veteran's Job Number or component in the proposed training, veterans may be included in the proposed training population.

## **PROJECT DETAILS**

ETP funds will assist CMEC to provide more comprehensive manufacturing and warehouse training, to improve performance, and to compete in the manufacturing industry by increasing efficiencies on all fronts. The Company is focused on increasing its automation processes and equipment to reduce labor costs, lower part-cycle times, reduce wasted materials, increase consistent quality control, and to shift employees to more skill-intensive duties. Additionally, it needs training on sales and marketing to gain a greater understanding of new markets, sales, budgets, finance, accounting, costing, products and new systems.

ETP training will help CMEC increase its product lines. By January of 2024, the Company plans to install new heavy assembly and production equipment with an estimated cost of 2M. ETP funds will assist the Company in increasing its client base, resulting in increased revenues that will contribute to workforce retention. Training will allow team members to target new customers in Europe, North America, and Asia. The improved knowledge and skills will not only allow the employees to maximize performance for their respective departments, but training will also create career pathways for existing employees wishing to move up in the Company.

### **Retrainee - Job Creation**

In this proposal, the Company plans to 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. 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, resulting from an expanded customer base from new product lines, CMEC must hire new staff. New product lines include pothole protection system, the SpeedLevel Sigma Lift, the Titan Boom 40-S, the Crossover electric mid-size rough terrain scissor lifts, the new electric drive 1330SE slab scissors. CMEC plans to continue developing more cutting-edge products like the All-Electric 16 Foot Mass. It is also currently in a process of entering new vertical mast lifts' markets and increasing its presence in European markets such as England Nationwide Rental.

### **Training Plan**

The following training will be conducted via Class/Lab and E-Learning in the following:

**Business Skills:** Training will be offered to Administrative Staff, Customer Service, and Sales Staff in Creative Marketing, Leadership, and Project Management and Methodology for increased efficiencies on finances for increased profitability, retention of team members, and creation of new jobs.

**Commercial Skills:** Training will be offered to Engineers in Building Systems, Engineering Theory/Planning/Design and Work Order Processing.

**Computer Skills:** Training will be offered to all occupations and include Advanced Microsoft Office, Financial Management System, and QuickBooks to improve quality and efficiency in performance of job duties.

**Continuous Improvement:** Training will be offered to all occupations and include Cross Training, Lean Procedure Practicing, and Statistical Process Control to increase awareness, maximize safety and maintain compliance by developing and practicing workplace safety skills by implementing best practices.

**Management Skills:** Training will be offered to Managers in Coaching Procedures, Finance for Technical Managers, and Teambuilding.

**Manufacturing Skills:** Training will be offered to Operations and Shipping and Warehouse Staff and include Assembly Procedures, Manufacturing Processes and Machine Operation.

**Hazardous Material:** Training will be offered to Operations in Hazardous Materials Handling and Hazardous Waste Cleaning/Handling.

## **Certified Safety Training**

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

## **High Unemployment Area**

All Matrinees (Job Numbers 1 and 2) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company’s locations in Kerman (Fresno County) 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 pre-retention wages. The Company is requesting this wage modification to \$18.00 per hour in Job Number 1; and \$15.50 per hour in Job Number 2 (Job Creation/HUA).

Approximately 121 Administrative Staff, Customer Service, Operations, Quality Control, and Shipping and Warehouse Staff will need the wage modification.

## **Commitment to Training**

CMEC invests \$200,000 on its annual training budget in California. This includes basic-computer skills, violence in the workplace prevention, orientation for staff, and anti-harassment 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 Chief Financial Officer (dedicated administrator) will oversee the ETP project. The Company has identified a number of dedicated staff (HR Manager and a supervisory team) to handle project administration. Training will be delivered by 15 in-house experts who work in various supervisory and management positions, and hold minimum of bachelor’s degree with more than five years of training experience. CMEC has also hired a third-party subcontractor to assist with ETP administration.

## **Impact/Outcome**

With ETP funds, training will enhance staff skills in manufacturing and will enable CMEC to increase quality, throughput, and efficiencies. Training will also provide promotional opportunities to the current employees, while helping them gain the necessary skills and experience for future career opportunities. ETP training will also help the Company maintain its production lines to keep pace with growing customer demands for aerial lift products and to remain competitive in a fast paced and improving manufacturing industry by upskilling its workforce.

Also, some of CMEC’s staff will earn OSHA 10/30 certification and other in-house certificates. Employees and their progress will be recognized on a daily, monthly, quarterly, and annual basis especially during employee evaluations. Certificates will be distributed to employees at the completion of certain training programs such as the following topics: Enhanced Quality Control,

Creating a Lean Manufacturing Environment, Sales and Marketing training, and Supervisory Skills/Leadership Development.

### **DEVELOPMENT SERVICES**

CALBEC in Farmersville assisted with development of this proposal for a flat fee of \$15,000.

### **ADMINISTRATIVE SERVICES**

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

### **TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Communication
- Business Fundamentals
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Dealing with Difficult People
- Employee Coaching
- Essential Skills for the New Supervisor
- Financial Analysis
- Leadership
- Marketing/Sales Techniques
- Operational skills
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Retaining Customers
- Relationship Building
- Strategic Planning
- Successful Selling Techniques/Sales
- Time Management

**COMMERCIAL SKILLS**

- Building Systems
- Engineering
- Theory/Planning/Design
- Work Order Processing

**COMPUTER SKILLS**

- Advanced Microsoft Office
- Financial Management System
- Quickbooks

**CONTINUOUS IMPROVEMENT SKILLS**

- Cross Training
- Creating a Quality Organization
- Change Management
- Decision Making
- How to Coach and Mentor
- Leadership
- Lean Procedures Practices
- Meeting Management

- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Project Management
- Problem Solving and Decision Making
- Process Capability
- Quality Measurement Systems
- Root Cause Analysis
- Statistical Process Control
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Time Management

**HAZARDOUS MATERIALS SKILLS**

- Hazardous Materials Handling
- Hazardous Chemical Cleaning/Handling
- Hazardous Waste Cleaning

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

- Coaching Procedures
- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership
- Motivation
- Teambuilding

**MANUFACTURING SKILLS**

- Assembly Process Control
- Assembly Procedures
- Blue Print Reading and Schematics
- Cross-training in Production Equipment/Skills
- Changeover Procedures
- Computer Numeric Control (CNC) Machining: (CNC Machine Operation, Drills, Lathes, Milling Machines, Grinders)
- Electrical and Electronics
- Equipment Operation
- Hydraulics
- Inventory Control
- Machine Operation
- Machine Maintenance
- Manufacturing Practices
- Pneumatics
- Production Operations
- Parts and Products Manufacture
- Safety Training

- Troubleshooting
- Warehousing

**SAFETY SKILLS – OSHA 10 (CERTIFIED-OSHA INSTRUCTOR)**

- OSHA 10

**SAFETY SKILLS – OSHA 30 (CERTIFIED-OSHA INSTRUCTOR)**

- OSHA 30



Retrainee-Job Creation  
**Training Proposal for:**  
**Cook General Engineering, Inc.**  
**Contract Number: ET24-0248**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** A. Reyes

**PROJECT PROFILE**

Contract Attributes:	SB <100 Priority Rate Job Creation Initiative Retrainee SET	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 67	U.S.: 67	Worldwide: 67
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$182,183

<b>Total ETP Funding</b>
\$94,944

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, OSHA 10/30	64	8-200	0-37	\$1,311	\$30.90
				Weighted Avg: 57			
2	Retrainee SB <100 Priority Rate SET Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, OSHA 10/30	6	8-200	0-37	\$1,840	\$20.00
				Weighted Avg: 80			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1 (Retrainee/SET): \$30.90 per hour for Sacramento County; Job Number 2 (Job Creation): \$18.54 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 \$0.90 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Administrative Staff	\$31.25 - \$43.27	4
Field Crew	\$30.00 - \$52.00	43
Foreman	\$50.00 - \$60.00	7
Project Oversight	\$46.15 - \$96.15	4
Shop Staff	\$33.00 - \$42.00	4
Superintendent	\$60.10 - \$79.33	2
Job Number 2 (Job Creation)		
Administrative Staff	\$25.00 - \$27.50	1
Field Crew	\$20.00 - \$23.00	2
Foreman	\$35.00 - \$40.00	1
Project Oversight	\$28.40 - \$32.00	1
Shop Staff	\$28.40 - \$32.00	1

## **INTRODUCTION**

Founded in 2002 and headquartered in Rancho Cordova, Cook General Engineering, Inc. (Cook Engineering) ([www.cookengineeringinc.com](http://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 second ETP Contract and second in the last five years.

### **Veterans Program**

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

## **PROJECT DETAILS**

The previous project focused on the expansion of business processes that Cook Engineering had done through the use of new equipment and technology. This project will build on the previous contract and improve on the training that was done. After completing the previous contract, the Company has found key areas of need that training will remedy.

One of these areas is in the training of new heavy machinery, which has become more advanced. Due to this, when the Company needs to get new heavy machinery, training is needed for the operators in order to safely use the machinery, as well as the mechanics who must know how to repair the equipment. In addition to training on heavy machinery, Cook Engineering has recently acquired new hand tools and is making a shift from gasoline-powered tools, to rechargeable electric-powered tools. With the shift to new equipment, field crews will need to learn how to use and perform maintenance on these new tools, including processes on how to recharge and replace batteries in the field.

The last key area of training that the company has identified is the move towards a new project management software. Due to the growth that the company has experienced over the past few years, Cook Engineering has had to reevaluate the software that they are using for project management. This has lead them to transition from PlanGrid to the ProCore software. This new software will assist the company with their ability to store and iterate on construction plans. The key difference between these software products is that ProCore is able to maintain live plans, manage construction documents, create submittals, enable workforce planning, and enable plan-sharing. PlanGrid is able to do portions of this, but would require external software to cover it all.

### **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 implementation of new technologies, Cook Engineering has a need for more infrastructure within the company. In order to meet this, the Company will hire 6 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, and Computer-Based Training 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 Oversight, Shop Staff, and Superintendent. Training will focus on processes necessary to complete projects. Training will consist of Demolition, Estimating, Heavy Machinery, 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 ProCore.

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

### **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 for its sole Rancho Cordova location is approximately \$105,000 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 expert.

### **Other Resources**

Cook Engineering has received federal hiring tax credits over that past few years. In the past year, it has received \$3,192 in Work Opportunity Tax. The Company anticipates additional Work Opportunity Tax Credits this fiscal year as well.

**Special Employment Training**

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

**➤ 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 \$41.20 to \$30.90). The Company requests this modification.

**Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

**ACTIVE PROJECTS**

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

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Retained	Potential Earnings (Based on Tracked Hours) (\$ %)
ET22-0146	\$90,229	11/22/2021- 11/21/2023	67	0	\$90,229 (100%)

Based on ETP Systems, 4,147 reimbursable hours have been tracked for potential earnings of \$90,229 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through August 2023.

**DEVELOPMENT SERVICES**

The Company retained Carrazco LLP, Innovative Tax Solutions in Sacramento to assist with development of this proposal for a flat fee of \$2,820, and Sierra Consulting Services to assist with development of this proposal for a flat fee of \$6,580.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**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
- COVID-19 Prevention
- Demolition
- Equipment Maintenance/Repair
- Equipment Operation
- Estimating

- Excavating Forklift – Powered Industrial Truck Operators
- Grading
- Hand Tools
- Heavy Machinery
- How to Deal with Public (Public Relations)
- Material Handling
- 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
- Respirator Safety
- Scheduling
- Shoring
- Silica Awareness
- Traffic Control and Flagging Operations
- Trenching
- Underground Utility Installation
- USA Ticket Management
- Valley Fever
- Work Orders

**Computer Skills**

- Adobe
- Agtek
- BlueBeam
- DOORS & TRUCRS – Air Resource Board Program
- Dunn & Bradstreet
- Financial Management System (Foundation Software)
- GPS Tracking
- HCSS – HeavyBid
- HCSS – HeavyJob
- HCSS – Dispatcher
- HCSS – E360
- HCSS – Intelligence
- HCSS – Plans
- HCSS – Safety
- Heavy Construction System Specialist (HCSS) – Aerial
- Insurance Portal
- iOS (Apple Mobile Operating Software) & iCloud
- LevelSet – Prelim
- Microsoft Office (Intermediate/Advanced)
- Microsoft Project
- Newport Group Website
- PINS Advantage Software
- Procore

- SQL Server (Management Studio)
- Telematics – Topcon/Trimble (GPS)
- Textura
- Vibe Board

**Continuous Improvement Skills**

- Change Management
- Coaching Procedures
- Communication Skills
- Creating a Quality Organization
- Cross Training
- Decision Making
- Effective Meetings for Leaders
- How to Coach and Mentor
- 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
- Visual Controls

**Hazardous Materials Skills**

- Bloodborne Pathogens
- Hazardous Chemical Cleaning/Handling
- Hazardous Materials Handling
- Hazardous Waste Cleaning

**Safety Skills - OSHA 10 (Certified-OSHA Instructor)**

- OSHA 10

**Safety Skills - OSHA 30 (Certified-OSHA Instructor)**

- OSHA 30

**Computer-Based Training**

Trainees may receive any of the following:

**Safety Skills - OSHA 10 (Certified-OSHA Instructor)**

- 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

**Safety Skills - OSHA 30 (Certified-OSHA Instructor)**

- 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



Retrainee-Job Creation

Training Proposal for:

**Earthlite, LLC**

**Contract Number: ET24-0239**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** San Diego

**Analyst:** P. Duarte

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 104	U.S.:104	Worldwide: 104
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	10%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$140,255

<b>Total ETP Funding</b>
\$133,400

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills Cont. Impr. Computer Skills Mfg.. Skills	104	8-200	0	\$1,150	\$22.66
				Weighted Avg: 50			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills Cont. Impr. Computer Skills Mfg. Skills	10	8-200	0	\$1,380	\$18.54
				Weighted Avg: 60			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$22.66 per hour; Job Number 2 (Job Creation): \$18.54 per hour in San Diego County.

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1, and \$1.54 for Job Number 2.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administration Staff	\$20.16 - \$25.00	2
	\$25.01 - \$27.00	8
Production Staff	\$20.16 - \$25.00	10
	\$25.01 - \$26.00	84
<b>Job Number 2 (Job Creation)</b>		
Production Staff	\$17.00 - \$20.00	2
	\$20.01 - \$23.00	8

**INTRODUCTION**

Founded in 1987 and headquartered in Vista, Earthlite, LLC ([www.earthlite.com](http://www.earthlite.com)) (Earthlite) manufactures and supplies a wide range of wellness related products such as wooden stationary and electric lift massage tables, massage chairs and massage accessories. The Company uses farmed and renewable wood sources including Canadian hard maple to manufacture table legs and braces, and Baltic birch plywood for table tops. The Company streamlines its operations by both buying and cutting the wood, as well as creating new products from excess materials to reduce waste. The Company has also implemented a recycling program for aluminum, glass, and paper products at its factory.

Earthlite's customers include well-known resorts in the U.S. and around the world, including Hyatt, Marriot and Las Vegas hotels and resorts such as MGM, Bellagio, Wynn, Caesar's Palace and Mandalay Bay that provide wellness and massage services.

## **Veterans Program**

While the Company does not have a formal targeted Veteran program, the Company encourages veterans to apply for open positions and veterans are given special consideration when they apply.

## **PROJECT DETAILS**

Earthlite has experienced increased demand in products as the rise of internet use and global expansion of massage modalities have substantially incremented. The Company's expansion plan includes integrating new business units and adding new wellness products which require training. Training will support these changes to seamlessly introduce the new products with the most effective manufacturing processes, quality assurance, and minimal product faults.

Additionally, Earthlite's priorities extend beyond product quality and consistency. It ensures its employees are thoroughly trained, have the skills to succeed in their jobs, and are provided with opportunities for growth and stability. The Company is developing a succession plan, hiring replacement workers, and cross-training employees on multiple tasks and processes.

Earthlite has also made safety training a priority in order to support its planned production targets. The Company has scheduled safety training for its trainees on a monthly basis. Training will also include Lean and logistics training such as: Lean Six Sigma (yellow and green belt), Master Scheduling Planning, New Product Development and ISO 9001.

## **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 Company's increased demand for products and succession planning, the Company places a strong emphasis on hiring and retraining qualified personnel to meet expansion and production goals. In this proposal 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 and E-learning in the following:

**Business Skills:** Training will be offered to Administrative Staff and will focus on Coaching, Customer Relations, Leadership, Project Management, Customer Service and Communication Skills.

**Computer Skills:** Training will be offered to Administrative Staff and will focus on Accounting, Crystal Reports, CircuitCam, Program Management, Purchasing and Microsoft Office.

**Continuous Improvement:** Training will be offered to all occupations and will focus Corrective/Preventive Actions, Lean Manufacturing, Process Improvement, Quality and Productive Improvement.

**Manufacturing Skills:** Training will be offered to Production Staff and will focus on Inspection and Programming, Equipment Operation, Material Requirements Planning and Statistical Process Control (SPC).

### **Commitment to Training**

EARTLITE, LLC's annual training budget is approximately \$100,000 for training. Training includes state-mandated training, legal compliance training, basic construction skills, first, safety training and new-hire orientation.

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

#### ➤ Training Infrastructure

The Company's COO will oversee the project. The HR Manager and seven lead department trainers will coordinate the attendance and roster collection. Training is scheduled to begin upon approval and will be delivered by in-house subject matter experts. The Company has also retained the services of a third party administrator to assist with the administration of this project.

### **Impact/Outcome**

At the completion of training, trainees will be equipped with the necessary industry knowledge and overall comprehensive training to adequately respond to the increased customer demand and industry changes. Training will also provide increased wages, employee advancement, and long term career paths.

### **Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

### **DEVELOPMENT SERVICES**

Earthlite, LLC retained Training Funding Source Services in Seal Beach to assist with development of this proposal for a flat fee of \$1,900.

### **ADMINISTRATIVE SERVICES**

Earthlite, LLC retained Training Funding Source Services in Seal Beach to perform administrative services in connection with this proposal for a fee to exceed 13% of payment earned.

### **TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Coaching
- Communication
- Conflict Resolution
- Customer Relations
- Finance
- Goal Setting
- Inventory Control
- Leadership
- Marketing & Business Development
- Program Management
- Product Knowledge
- Project Management
- Team Cohesiveness

**Computer Skills**

- Accounting
- CircuitCam
- Crystal Reports
- Materials Requirement Planning (MRP)
- Manufacturing Operations
- MS Office (Intermediate)
- MS Project
- Program Management
- Purchasing
- Quote FX
- Scheduling
- Warehouse Logistics

**Continuous Improvement Skills**

- Corrective/Preventive Actions
- Lean Manufacturing
- Process Improvement
- Productivity Improvement
- Quality improvement

**Manufacturing Skills**

- Inspection and Programming
- DEK Stencil Printer
- Equipment Operation, Maintenance & Troubleshooting
- Inspection Techniques
- Lean Manufacturing
- Moisture Sensitive Devices
- Material Requirements Planning
- Preventative maintenance
- SMT and Stencil Operation
- Statistical Process Control (SPC)



Retrainee-Job Creation  
**Training Proposal for:**  
**Greenheart Farms, Inc.**  
**Contract Number: ET24-0230**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Agriculture  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Luis Obispo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 160	U.S.:160	Worldwide: 160
<u>Turnover Rate:</u>	11%		
<u>Managers/Supervisors:</u> (% of total trainees)	9%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$138,200

<b>Total ETP Funding</b>
\$135,125

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Imprv. Mfg Skills	99	8-200	0	\$1,081	\$22.66
				Weighted Avg: 47			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Continuous Imprv. Mfg Skills	26	8-200	0	\$1,081	\$18.54
				Weighted Avg: 47			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$22.66 per hour for San Luis Obispo County  
Job Number 2 (Job Creation): \$18.54 per hour for San Luis Obispo 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 \$1.54 per hour for Job Number 2.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff	\$20.16 - \$22.73	10
Engineer	\$25.03 - \$27.98	10
Field Staff	\$20.20 - \$22.67	15
Manager/Supervisor	\$25.25 - \$36.76	9
Production Staff	\$20.20 - \$24.98	25
Restoration Specialist	\$22.70 - \$24.86	10
Support Staff	\$25.04 - \$27.25	5
Transplant Staff	\$22.67 - \$24.95	15
Job Number 2 (Job Creation)		
Administrative Staff	\$18.53 - \$19.73	2
Engineer	\$25.03 - \$27.98	4
Field Staff	\$17.21 - \$19.91	5
Manager/Supervisor	\$25.25 - \$36.76	2
Production Staff	\$17.00 - \$24.98	5

Restoration Specialist	\$22.30 - \$24.86	3
Support Staff	\$25.04 - \$27.25	1
Transplant Staff	\$20.05 - \$24.95	4

## **INTRODUCTION**

Founded in 1979 and located in Arroyo Grande, Greenheart Farms, Inc. (Greenheart) ([www.greenheartfarms.com](http://www.greenheartfarms.com)) produces and grows vegetables, roses and herbs. Greenheart also specializes in transplant, horticulture and restoration through its innovation and latest technology system. With 123 acres, Greenheart grows cauliflower, celery, tomatoes peppers, lettuce and variety of roses and herbs. Customers include retail and wholesale flower and vegetable distributors, farmers as well as restoration merchant such as Jackson and Perkins, Freitas Brothers Farming, and the US Government Department of Reclamation. Its products are sold to customers across California and worldwide. This will be Greenheart's first ETP Contract.

### **Veterans Program**

Although the Company does not have a separate Veterans Job Number, Greenheart encourages and recruits Veterans into its workforce.

## **PROJECT DETAILS**

Greenheart requests ETP funding to train 99 full-time employees and 26 Job Creation workers. To remain competitive, meet customers' expectations and demands, and support current and future business needs, Greenheart must develop the skill sets of its workforce in order to adapt to the new business environment resulting from the COVID-19 pandemic. The Company also faces challenges related to water conservation, technological advances, and industry requirements. Therefore, Greenheart has developed and designed a company-wide training plan to keep staff employed, updated with industry requirements, and implemented processes and practices quickly and efficiently, while maintaining superior quality products and services.

ETP funding will assist Greenheart to upgrade worker skills, increase production efficiencies, meet industry standards, provide quality products, use water efficiently, and effectively manage overall business growth. Workers will gain skills to optimize job performance, better serve customers, improve competences, and increase opportunity in career advancement.

### **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 the past year, Greenheart has experienced a 10% growth in business volume and is expanding existing business capacity. The Company also anticipates a 10% growth in business over the next two years. To support the increase in production and operations, Greenheart has committed to hiring 26 new employees (Job Number 2). These new employees will support business growth and the Company's new process method to overcome the drought challenges. Greenheart will train these new employees to learn and operate sophisticated equipment, technology systems, and computer programs. Trainees will also have a better understanding of the Company's business operations. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract. Turnover Rate penalty is not assessed for job creation.

## Training Plan

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

**Business Skills:** Training will be offered to all occupations and focus on business processes and operations, customer service, and product knowledge. Training will improve and increase employee skills to work more effectively, increase in sales, and help lead the Company through a new business environment.

**Computer Skills:** Training will be offered to all occupations to help workers become more proficient in the Company's various software applications necessary to provide efficient and effective customer services, and tools to effectively perform their job functions.

**Continuous Improvement:** Training will be offered to all occupations, with emphasis on Food Safety, Horticultural Best Practices, Product Knowledge, and Product Quality Assurance. Training is designed to help trainees to keep up with industry requirements, exceed standard practices, and increase opportunities to promote within the Company.

**Manufacturing Skills:** Training will be offered to Field, Production, Restoration Specialist, Support and Transplant Staff to provide upgraded job skills with a focus on operating efficiencies, equipment operations and overall production operations to meet growing customer demands.

## Commitment to Training

Greenheart has a current annual training budget of approximately \$143,700 and includes basic job skills training, new employee orientation, OSHA-mandated safety training, on-the-job training program for manufacturing skills and basic computer skills.

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

### ➤ Training Infrastructure

Training is scheduled to begin upon Panel approval and will be delivered on-site by in-house experts and vendors if needed. The Human Resource Manager will oversee the training project and administrative responsibilities. Greenheart has designated a team of one Training Coordinator and five Managers/Supervisors who have approximately three years of manufacturing experience to schedule, document and deliver training, secure rosters, and ensure ETP compliance. The Company has also retained a third party subcontractor to support project administration duties including enrollment, data tracking, invoicing, participating in ETP monitoring, and ensuring compliance with ETP requirements.

## Green/Clean Operations

Greenheart is committed to company growth, while also implementing Green/Clean processes. The Company provides consumers with quality choices and uses less water to produce products. The Company adjusts dripping and sprinkler irrigation systems to deliver water directly to the root zone of plant and minimizing water usage through evaporation and runoff. In addition, soil moisture sensors are installed into the ground to monitor moisture levels. By combining these systems, workers can significantly reduce water usage while maintaining crop yields as well as promote more sustainable practices.

### **DEVELOPMENT SERVICES**

National Training Company, Inc. in Irvine assisted with project development for a flat fee of \$6,700.

### **ADMINISTRATIVE SERVICES**

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

### **TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Accounting Skills
- Customer Education
- Customer Knowledge
- Marketing Strategy
- Product Knowledge
- Production & Inventory
- Retail Horticulture
- Shipping Protocols
- Transplanting Schedules
- Website Development & Maintenance

**Computer Skills**

- Advanced Computer Applications
- Budgeting Software
- Business Systems
- Database Management
- Greenhouse Operations Software
- Integrated Software Systems Training
- Invoicing & Shipping Software
- Microsoft Office (Intermediate/Advanced)
- Production Software
- Project Management Software Skills

**Continuous Improvement Skills**

- Food Safety
- Horticultural Best Practices
- Plant Processes
- Plant Species Knowledge
- Product Inventory & Storage
- Product Knowledge
- Product Quality Assurance
- Transport Packaging

**Manufacturing Skills**

- Container Return Procedures
- Ecosystem Protection
- Energy Efficiency
- Greenhouse Horticultural Practices
- Greenhouse Maintenance
- Greenhouse Rotation Methods
- Integrated Waste Management.
- Irrigation Maintenance

- Plant Delivery Methods
- Plant Propagation Methods
- Restoration Project Skills
- Revegetation Techniques
- Seed Growth Procedures
- Standard Operating Procedures
- Transplant Production Skills
- Transplanting Techniques
- Vegetative Propagation Procedures
- Water Conservation



Retrainee-Job Creation

Training Proposal for:

**O'Neill Beverages Co. LLC dba O'Neill Vintners & Distillers**

**Contract Number: ET24-0249**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** J. Dongallo

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate HUA Job Creation Initiative	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Marin, San Luis Obispo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 316	U.S.: 316	Worldwide: 316
Turnover Rate:	3%		
Managers/Supervisors: (% of total trainees)	7%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$230,305

<b>Total ETP Funding</b>
\$186,392

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Cont. Impr., MFG Skills, Hazardous Materials Skills, Literacy Skills, OSHA 10/30, PL - MFG Skills	226	8-200	0	\$644	\$17.00
				Weighted Avg: 28			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Impr., MFG Skills, Hazardous Materials Skills, Literacy Skills, OSHA 10/30, PL - MFG Skills	12	8-200	0	\$644	\$22.66
				Weighted Avg: 28			
3	Retrainee Priority Rate Job Creation Initiative HUA	Business Skills, Computer Skills, Cont. Impr., MFG Skills, Hazardous Materials Skills, Literacy Skills, OSHA 10/30, PL - MFG Skills	25	8-200	0	\$1,104	\$17.00
				Weighted Avg: 48			
4	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Cont. Impr., MFG Skills, Hazardous Materials Skills, Literacy Skills, OSHA 10/30, PL - MFG Skills	5	8-200	0	\$1,104	\$18.54
				Weighted Avg: 48			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1 & 3 (HUA): \$17.00 per hour for Fresno County; Job Number 2: \$22.66 per hour for San Luis Obispo County, \$24.72 per hour for Marin County. Job Number 4 (Job Creation): \$18.54 per hour for San Luis Obispo County, \$20.60 per hour for Marin County.

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 2 and up to \$1.54 per hour may be used for Job Number 4.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee/HUA)</b>		
Administrative Staff	\$17.00 - \$20.00	5
	\$20.01 - \$25.00	7
	\$25.01 - \$77.50	25
Maintenance	\$18.50 - \$20.00	2
	\$20.01 - \$25.00	3
	\$25.01 - \$42.70	13
Operations	\$17.00 - \$20.00	57
	\$20.01 - \$25.00	62
	\$25.01 - \$68.91	44
Sales	\$31.05 - \$77.63	8
<b>Job Number 2 (Retrainee)</b>		
Administrative Staff	\$29.00 - \$55.41	2
Operations	\$20.16 - \$25.00	4
	\$25.01 - \$60.10	6
<b>Job Number 3 (Job Creation/HUA)</b>		
Administrative Staff	\$17.00 - \$20.00	1
	\$20.01 - \$25.00	1
	\$25.01 - \$77.50	1
Maintenance	\$18.50 - \$20.00	1
	\$20.01 - \$25.00	1
Operations	\$17.00 - \$20.00	7
	\$20.01 - \$25.00	7
	\$25.01 - \$68.91	3
Sales	\$31.05 - \$60.00	3
<b>Job Number 4 (Job Creation)</b>		
Operations	\$17.00 - \$20.00	2
	\$20.01 - \$25.00	2
	\$25.01 - \$60.10	1

## **INTRODUCTION**

Founded in 2004 and headquartered in Larkspur, O'Neill Beverages Co. LLC dba O'Neill Vintners & Distillers (O'Neill Beverages) ([www.oneillwine.com](http://www.oneillwine.com)) is a family-owned and operated winery and distillery specializing in the production and distribution of bulk wine, brandy, and spirits. O'Neill Beverages is the 7th largest winery in California with approximately 7,000 acres of vineyard

throughout the Central Valley. The Company also contracts with another 15,000 acres of vineyards throughout the state. Its customer base includes retailers and restaurants throughout the United States. ETP training will be conducted at its locations in Parlier, Larkspur and Paso Robles. This will be O'Neill Beverages' third ETP Contract and third in the last five years.

### **Veterans Program**

O'Neill Beverages actively works with organizations and job placement firms through staffing/recruiting services, local workforce agencies, such as CalJobs, and Facebook community groups. However, the Company did not specifically include a Veteran component in this project.

### **PROJECT DETAILS**

In the previous proposal, training focused on the Company's processes and procedures for new equipment, new products, such as spritzers and seltzers, COVID-19 related protocols, safety in the workplace and new employees (27% growth). Training under this proposal will focus on software replacement, depalletizing for economic and environmental benefits, implementation of acquired knowledge from a three-year Regenerative Viticulture pilot program and profitability by increasing efficiency and strategic planning insight. Staff must train to effectively do their jobs while maintaining a high level of customer service.

In addition, the Company invested over \$30k on new software called DeaCom Enterprise Resource Management (ERP) and will be effective in the first quarter of 2024. Once in place, O'Neill Beverages will be training employees on the system's numerous modules and procedures. This new software will include all areas of manufacturing, such as, warehousing, purchasing, production, bottling, inventory management, sales, management, laboratory/research, work order assignment, quality control and accounting. This process will eliminate redundancy by providing access to the information in one place.

Lastly, O'Neill Beverages will focus on its day-to-day operations to develop new strategies, increase short-term cost-saving opportunities, and improve performance to ensure that its operation infrastructures are aligned with the Company's long-term goals to improve customer services. O'Neill Beverages will be developing adaptive and interactive platforms to manage costs, and measure consumer needs and expectations. Training will ensure all regulatory changes are met while improving quality processes, outcomes and measures. In addition, enhancing employee skills will enable O'Neill Beverages to remain competitive within the industry and offer higher workplace promotional opportunities.

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

### **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, O'Neill Beverages will continue to expand business capacity and training programs. The Company will hire 30 new employees (Job Number 3 & 4). Because of the specialized production processes of the business, O'Neill Beverages have a heightened need to attract and retain qualified Administrative Staff, Maintenance, Operations and Sales. To secure new talent, the Company is increasing its commitment and resources to worker training and creating an environment of training to advance employees success and careers. 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 (PL) methods in the following:

**Business Skills:** Training will be offered to all occupations and will focus on enhancing communication and project management. Training topics include Business Communication, Conflict Resolution, Cost Control, Interpersonal Communications, Operational Skills, Product Knowledge, and Strategic Planning.

**Computer Skills:** Training will be offered to all occupations and focus on building competency on the Company's systems. Training topics include Customer Relationship Management, Deacom Enterprise Resource Management, Paylocity, and Vinter's Advantage (in-house system).

**Continuous Improvement:** Training will be offered to all occupations on course topics including Cross Training, Meeting Management, Process Improvement, Project Management, and Problem Solving and Decision Making to create a more effective and efficient workforce.

**Hazardous Materials:** Training will be offered to Maintenance and Operations occupations on course topics like Hazardous Materials Handling, Hazardous Chemical Cleaning/Handling, and Hazardous Waste Handling/Disposal to ensure safe handling of hazardous materials.

**Manufacturing Skills:** Training will be offered to Maintenance and Operations occupations on course topics like Bottling Production, Confined Space, Crush Equipment, Fermentation Tanks, Equipment Operation, Hydraulics, Machine Operation, Pneumatics, Production Operations, Troubleshooting, Warehousing, and Winery Production. Training will focus on new production techniques and Lean processes to ensure efficient production.

**Literacy Skills:** Training will be offered to all occupations and focus on enhancing communication. Training topics include Vocational English as a Second Language.

## Certified Safety Training

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

## **Productive Laboratory**

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

O'Neill Beverages will provide approximately 7 hours of PL-Manufacturing Skills training to Maintenance and Operations occupations on specific operation skills on new machines and tools. They will also receive vital cross-training on multiple production lines and procedures. O'Neill Beverages anticipates that approximately 180 employees from the Fresno, Larkspur and San Luis Obispo facilities will participate in PL training.

Instructors will be subject matter experts and will demonstrate the process prior to observing the trainees performing the task. The instructor will provide coaching and mentoring until the trainee has been determined competent in the process.

During PL training, production is expected to be slower given that the trainee will be working with equipment and will be required to meet established quality standards. The Company is requesting a trainer-to-trainee ratio of 1:3 as some training requires working in teams of three.

## **Commitment to Training**

O'Neill Beverages spends \$260,000 per year on training in California. The Company provides new hire orientation, safety training, California labor laws and regulations, basic computer skills, violence in the workplace prevention, and sexual harassment prevention. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### **➤ Training Infrastructure**

The Director of Human Resources (dedicated administrator) will oversee this project. A Division Manager and Operations Manager at each facility will also be responsible for administration at their particular facility. A third party administrator will assist with the implementation, compliance, reporting and reimbursements for the Contract. Training will be delivered by in-house experts and vendors as needed. Other trainers will be identified as they are retained.

## **High Unemployment Area**

Trainees in Job Numbers 1 & 3 work in a HUA, a region with unemployment exceeding the state average by at least 25%. The Company's locations in Fresno County 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 pre-retention wages. O'Neill Beverage is requesting a wage modification for Job Number 1 from \$22.66 per hour to \$17.00 per hour and a wage modification for Job Number 3 from \$18.54 per hour to \$17.00 per hour.

Approximately 102 Administrative Staff, Maintenance, Operations and Sales will need the wage modification.

**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 \$ %
ET22-0101*	Parlier, Larkspur, Paso Robles	8/23/21 - 8/22/23	\$281,106	\$186,256 (66%)
ET19-0202	Parlier, Larkspur, Paso Robles	9/3/18 - 9/2/20	\$241,150	\$238,222 (98%)

\*ET22-0101 - O'Neill Beverages completed its current ETP Contract at 66%. This is due to the Company going through significant personnel changes and turnover. The Project Manager, and HR Vice President left the Company, which led to the ETP Contract being unmanaged for several months. In addition, training was affected by COVID restrictions that were in place at the time. Toward the end of the ETP project, the new HR team and Operations team banded together to bring in the rosters and brought the usable earnings up from 32% to 66% in the last 4 months of the project. Due to this experience, the HR team expects to do much better on the next ETP project. In addition, the Company now has fulltime staff in place who assisted in the revival of the training and data collection as a part of this upcoming Contract, which has been right-sized. The Company, also, has a clear training plan and prioritizes the ETP Program as its own initiative to ensure access to numerous personnel resources for a successful performance outcome.

**DEVELOPMENT SERVICES**

O'Neill Beverages retained Sierra Consulting Services, Inc. in Cameron Park to assist with development of this proposal for a flat fee of \$17,000.

**ADMINISTRATIVE SERVICES**

The Company also retained Sierra Consulting Services, 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Administration
- Behavior Style Strategies
- Business Communication
- Business Fundamentals
- Business Writing
- Communication styles
- Conflict Resolution
- Cost Control
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Dealing with Difficult People
- Develop Employee Accountability
- Employee Coaching
- Employee Engagement
- Essential Skills for New Supervisor
- Financial Analysis
- Financial Forecasting & Budgeting
- 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
- Relationship Building
- Retaining Customers
- Strategic Planning
- Supervisor Skills
- Time Management

**Computer Skills**

- Intermediate/Advanced Microsoft Office
- Customer Relationship Management
- Deacom Enterprise Resource Management (ERP)
- Financial Management System
- KnowB4
- Microsoft 365 - Intermediate/Advanced

- Operational Technology Systems (PLC's, Historian, Ignition, etc.)
- Paylocity (HRIS)
- SQL
- Vintner's Advantage
- Web Development Systems

**Continuous Improvement Skills**

- 5S
- Cross Training
- Communication Skills
- Creating a Quality Organization
- Change Management
- Effective Meetings
- How to Coach and Mentor
- Kaizen
- Lean Manufacturing
- Meeting Management
- Process Improvement
- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Project Management
- Problem Solving and Decision Making
- Process Capability
- Quality Measurement Systems
- Root Cause Analysis
- Team Building
- Teamwork Development Skills

**Hazardous Materials Skills**

- Bloodborne Pathogens
- Hazardous Chemical Cleaning/Handling
- Hazardous Materials Handling
- Hazardous Waste Handling/Disposal

**Literacy Skills**

Vocational English as a Second Language (VESL)

**Manufacturing Skills**

- Bottling Production
- Confined Space
- Cross-Training in Production Equipment/Skills
- Crush Equipment
- Changeover Procedures
- Computer Numeric Control (CNC) Machining
- Electrical and Electronics
- Environment Impact Planning
- Equipment Operation

- Fermentation Tanks
- Fall Prevention
- Forklift
- Hydraulics
- Inventory Control
- Juice/Wine Transfer Operations
- Lab Analysis Equipment
- Lock out/ Tag out
- Logistics & Shipping
- Machine Operation
- Machine Maintenance
- Manufacturing Practices
- Pneumatics
- Production Operations
- Parts and Products Manufacture
- Sanitation
- Scheduling
- Storage Tanks
- Troubleshooting
- Warehousing
- Winery Production
- Work Order Processing

**Safety Skills - OSHA 10 (Certified-OSHA Instructor)**

- OSHA 10

**Safety Skills - OSHA 30 (Certified-OSHA Instructor)**

- OSHA 30

**Productive Lab (Trainer-to-Trainee Ratio 1:1)**

Trainees may receive any of the following:

**Manufacturing Skills**

- Bottling Production Equipment Operation
- Crush Equipment Operation
- Changeover Procedures
- Computer Numeric Control (CNC) Machining
- Electrical and Electronics
- Equipment Operation
- Fermentation Tank Operation
- Forklift
- Hydraulics
- Juice/Wine Transfer Operations
- Lab Analysis Equipment
- Machine Operation
- Machine Maintenance
- Manufacturing Practices

- Pneumatics
- Production Operations
- Parts and Products Manufacture
- Sanitation
- Storage Tank Operation
- Troubleshooting
- Winery Production
- Work Order Processing



Retrainee-Job Creation  
**Training Proposal for:**  
**Prothena Biosciences Inc.**  
**Contract Number: ET24-0257**

**Panel Meeting of:** October 27, 2023

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

**Analyst:** S. Wang

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative SB <100	Industry Sector(s):	Services Professional, Scientific Technology Biotechnology/Life Sciences  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 95	U.S.: 134	Worldwide: 145
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$350,000

<b>Total ETP Funding</b>
\$144,900

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Comm. Skills, Cont. Improv., Mgmt. Skills	80	8–200	0	\$1,380	\$37.00
				Weighted Avg: 60			
2	Priority Rate SB<100 Job Creation Initiative	Business Skills, Comm. Skills, Cont. Improv., Mgmt. Skills	15	8–200	0	\$2,300	\$37.00
				Weighted Avg: 100			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$24.72 per hour for San Mateo County.  
Job Number 2 (Job Creation): \$20.60 per hour for San Mateo County.

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

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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1: Retrainee</b>		
Administrative Staff	\$37.00 - \$115.00	10
Managers/Supervisors	\$40.00 - \$140.00	15
Scientist, Engineer	\$37.00 - \$125.00	55
<b>Job Number 2: Job Creation</b>		
Marketing Staff	\$37.00 - \$115.00	7
Sales Staff	\$37.00 - \$115.00	8

**INTRODUCTION**

Founded in 2012 and located in South San Francisco, Prothena Biosciences Inc. (Prothena) (<https://www.prothena.com/>) is a clinical biotechnology company that develops novel and transformative medicines to help patients in critical need of new treatment options. Prothena expertise in protein dysregulation and a diverse pipeline of novel investigational therapies for neurodegenerative and rare peripheral amyloid diseases. The Company's product portfolio includes Birtamimab for Amyloidosis, Prasinezumab for Parkinson's Disease, and PRX005 for Alzheimer's Disease. These medicines help target pathogenic proteins to change the course of the disease. Customers includes medical centers, researchers, colleges, and hospitals throughout the world. This will be Prothena's first ETP Contract. Training will take place at the Company's single location in South San Francisco.

## Veterans Program

Although Prothena does not plan to include a separate Veteran's Job Number, the Company actively recruits and encourages veterans to apply for employment opportunities.

## PROJECT DETAILS

ETP-funded training will focus on the Company's strategic plan to help scale business while being cross-functional and commercially-oriented. Its product pipeline is moving into the later-stage of drug development, which requires a different and more advanced skillset beyond scientific research. This process requires business and clinical development skills such as strategic planning, cross-functional project management, financial management, and a broader knowledge of drug discovery and clinical operation procedures.

Additionally, Prothena is aiming to launch a new commercial product in 2024 through 2026. Commercial products would mean that the Company is able to market and sell its products to payers, patients, and healthcare providers.

## Retrainee - Job Creation

In this proposal, the Company will hire 15 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, Prothena has shifted from a primarily research and development company to soon having a number of marketed products and solutions to deliver to its customers. Due to this shift, Prothena will need more staff to be able to meet customer demands in the next two years and beyond.

## Training Plan

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

**Business Skills:** Training will be offered to all occupations and include Budget & Resource Management, Business Acumen, Decision Making, and Effective Communication Skills to ensure staff are up to date with the business processes.

**Commercial Skills:** Training will be offered to all occupations and include Clinical Data Science, Clinical Development, Drug Discovery & Development 101, and Preparing for Phase 3 Clinical Trials to ensure staff know the procedure to deliver the commercialized products.

**Continuous Improvement:** Training will be offered to all occupations and include Good Pharmaceutical Practices, Root Cause Analysis & Problem Solving, and Quality Management to ensure staff knows how to troubleshoot any issues.

**Management Skills:** Training will be offered to Managers/Supervisors and include Managing Others, Delegating & Prioritizing, and Leading Change to ensure capable management of staff.

## Commitment to Training

The Company's annual training budget in California is \$50,000 and includes rudimentary job skills, new-hire orientation, Business and Management Skills. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The Senior Director of Human Resources (dedicated administrator) will oversee the project with two Administrative Coordinators who will assist in the scheduling of training, collecting training records, and other internal-administrative duties. ETP-funded training will be delivered by internal experts and vendors as needed.

**Impact/Outcome**

As a result of ETP funds, Prothena's staff will receive Business Acumen certification upon completion of training.

**Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

Hands On, LLC in San Francisco has been retained to provide Business, Commercial and Continuous Improvement Skills training for a fee of \$115,000. Other trainers will be identified as they are retained.

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Budget & Resource Management
- Business Acumen
- Change Management
- Decision Making
- Effective Meetings
- Effective Communication Skills
- Finance for Non-Finance Managers
- Healthcare Economics
- Ideation & Innovation
- Increasing Resiliency
- Marketing 101
- Marketing 201
- Negotiating Skills
- Presentation Skills
- Project Management
- Strategic Planning
- Team Optimization
- Value-Based Healthcare & Market Accesses

**COMMERCIAL SKILLS**

- Clinical Data Science
- Clinical Development
- Clinical Operations
- Drug Discovery & Development 101
- Drug Discovery & Development 201
- Preparing for Commercialization
- Preparing for Investigational New Drug Applications
- Preparing for Phase 3 Clinical Trials

**CONTINUOUS IMPROVEMENT**

- Good Pharmaceutical Practices
- Quality Management
- Risk Management
- Root Cause Analysis & Problem Solving
- Business Process & Continuous Improvement

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

- Managing Others
- Delegation & Prioritization
- Leading High-Performing Teams
- Leading Projects
- Leading vs. Managing

- Leading Change
- Leading Large Teams & Leading through Others



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

**Contract Number: ET24-0240**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** San Diego

**Analyst:** P. Duarte

**PROJECT PROFILE**

Contract Attributes:	Retrainee SB <100 Priority Rate	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 97	U.S.:97	Worldwide: 97	
<u>Turnover Rate:</u>	12%			
<u>Managers/Supervisors:</u> (% of total trainees)	N/A			

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$90,000

<b>Total ETP Funding</b>
\$99,452

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Cont. Improv., Mfg. Skills	94	8-200	0	\$1,058	\$22.66
				Weighted Avg: 46			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** \$22.66 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.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Administration Staff	\$20.16 – \$25.00	2
	\$25.01 – \$40.00	1
Engineering Staff	\$39.00 – \$45.00	3
Inspection/Inspectors	\$20.16 – \$25.00	3
	\$25.01 – \$37.00	6
Machinists/NDT	\$20.16 – \$25.00	15
	\$25.01 – \$40.00	38
Production/Shop Helper/Lean Coordinator	\$20.16 – \$25.00	9
	\$25.01 – \$30.00	4
Supervisors/Managers	\$20.16 – \$25.00	2
	\$25.01 – \$42.00	11

**INTRODUCTION**

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

As part of its precision machining business, the Company also provides Computer Numerical Control turning, milling, grinding; conventional machining; welding; Electrical Discharge Machining; fabrication; inspection; engineering; Research and Development; aging/annealing; non-destructive testing; next higher assembly; and supply chain management. QCMI's has certifications also include from the FAA and US Department of Transportation. 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, Veterans East county Alliance, and NTVSI.org to help transitional Veterans gain employment in the civilian sector.

### **PROJECT DETAILS**

This will be QCMI's fifth ETP Contract and the third contract in the last five years. Training in this proposal will build on previous training and emphasize on the ongoing new and updated manufacturing standards and practices. In addition, QMCMI will continue to provide a career path through its planned training by equipping its trainees with the skill sets required to advance into roles as machine operators, inspectors, and other manufacturing positions and meet the company's increasing client demands. Training will also ensure new hires gain the product knowledge and proper training necessary to be successful.

Training will also continue to address the Company's objectives to cross train, impart skills, knowledge and experience from long-term retiring employees who have industry knowledge crucial to the Company's success. Additionally, QCMI will address industry changes in specialized manufacturing services for aerospace, industrial, heavy equipment, commercial, defense and power generation industries. 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 and E-Learning 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, Cost Benefit Analysis and Communication.

**Computer Skills:** Training will be offered to all occupations and include Microsoft Office, Enterprise Resource Planning, SolidWorks, MasterCam, Visual Fair and Coordinate Measuring Machine.

**Continuous Improvement:** Training will be offered to all occupations and include Six Sigma Green Belt, Lean Manufacturing, Quality Systems, Team Building, Leadership Skills, and International Traffic in Arms Regulations, Internal Auditor and Quality Clinics.

**Manufacturing Skills:** Training will be offered to Production, Engineering and Supervisors. Topics include Blueprint Reading, Machine Set Up, Machine Operation, Shop Inspection, Non-Destructive Testing and First Article Inspection.

### **Commitment to Training**

QCMI's annual training budget is approximately \$200,000 and includes new-hire onboarding and orientation, basic skills, 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. The Company's Chief Operating Officer/Chief Financial Officer will oversee the overall administration of the ETP project. The Human Resources Manager, who successfully managed the Company's prior and current ETP project, will 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. Training will be delivered on-site by in-house experts and vendors if needed.

### Impact/Outcome

The proposed training will allow the Company to provide trainees with the necessary industry knowledge and overall comprehensive training to adequately respond to the increased customer demand and industry changes. Training will provide employee growth opportunities while ensuring the best business practices and procedures to keep the company competitive.

### Alternate Recordkeeping

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

### ACTIVE PROJECTS

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

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Retained	Potential Earnings (Based on Tracked Hours) (\$ %)
ET22-0168	\$91,080	11/22/21-11/21/23	88	0	\$89,781 (98%)

Based on ETP Systems, 4,091 reimbursable hours have been tracked for 88 enrollees out of 96 estimated trainees with potential earnings of \$89,781 (98% of the approved amount).

### 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 \$ %
ET19-0240	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: Curriculum****Class/Lab/E-Learning**

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
- SolidWorks
- Visual Fair
- Coordinate Measuring Machine
- Programming

**Continuous Improvement Skills**

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

**Manufacturing Skills**

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



**Training Proposal for:**  
**Rockview Dairies, Inc. dba Rockview Farms**

**Contract Number: ET24-0231**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Teamsters Local Union No. 495 and No. 63		
Number of Employees in:	CA: 250	U.S.: 250	Worldwide: 250
<u>Turnover Rate:</u>	1%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$210,330

<b>Total ETP Funding</b>
\$157,320

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Imprv., Hazardous Mat. Mfg. Skills	180	8-200	0	\$874	\$22.66
				Weighted Avg: 38			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** \$22.66 per hour for Los Angeles County.

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

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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Logistics Staff	\$20.16 - \$25.00	18
	\$25.01 - \$33.30	60
Production Staff	\$22.99 - \$25.00	6
	\$25.01 - \$41.06	30
Operations Support Staff	\$24.32 - \$25.00	7
	\$25.01 - \$43.53	35
Manager/Supervisor	\$25.01 - \$40.00	14
Maintenance/Mechanic Staff	\$25.01 - \$38.80	10

**INTRODUCTION**

Founded in 1927 and headquartered in Downey, Rockview Dairies, Inc. dba Rockview Farms (Rockview) ([www.rockviewfarms.com](http://www.rockviewfarms.com)) is an independent, family-owned dairy manufacturer. For decades, the Company has produced, processed, packaged, and distributed dairy products such as milk, organic milk, butter, buttermilk, cottage cheese, cream, sour cream, yogurt, and eggnog. Rockview also offers juices, fruit drinks, water, tea, lemonade, salads, desserts, eggs and other dairy products. Additionally, Rockview owns its own farms and cows, raised without growth hormones. Rockview organic milk comes from cows fed with 100% certified organic feed produced on land untreated with synthetic fertilizers, pesticides, herbicides or fungicides for at least three seasons prior to harvesting the crop.

The Company distributes products to the food service industry, school districts, and independent markets, along with retail customers, drive-thru dairies and home delivery. The Company operates two facilities in California: Downey and Southgate. This proposal will target workers from both facilities, where all training will take place.

**Veterans Program**

Although the Company does not have a separate Veteran Job Number, Rockview welcomes Veteran applicants to join the Company, and consistently has 2% Veterans in its workforce.

## Union Support

Logistics Staff, Maintenance Staff, Production Staff are represented by Teamsters Local Union No. 63 and Operational Support Staff are represented by Teamsters Local Union No. 495. The unions have submitted letters of support for this training project.

## PROJECT DETAILS

This will be Rockview's second ETP Contract, and the second in the past five years. Previous training focused on operational changes in order to adapt to a new business environment resulting from the COVID-19 pandemic. Training under this proposal will concentrate on new Preventative Controls Qualified Individual, which includes process, allergen, sanitation and supply chain, reduce costs, dairy industry prices/costs pressure and challenges, customer demand and new filler processes to meet delivery schedule. In addition, entering 2023, producers are facing the prospects of continued high feed costs and uncertainty in forage supplies.

To meet remain competitive, support current and future business needs and meet customers' expectations and industry requirements, Rockview must cross-trained and develop the skill sets of its workforce to adapt to the new business environment, keep up with economic recovery and upgrading job-related skills. Rockview is striving to provide quality products and become more efficient in its processes. The Company's goal is to become a value-focused, customer-driven organization and a high performance workplace.

To support this shift in business, Rockview has implemented a formalized, company-wide training plan that will introduce cross-training to improve standard operating procedures, effective and efficient production processes, increase food safety, exceed customers' satisfaction and keep up with the industry's prices/costs pressure. ETP funding will assist Rockview to upgrade worker skills, increase production efficiencies, meet industry standards, provide quality products at a low cost, and effectively manage overall business growth. Workers will gain skills to optimize job performance, better serve customers and improve competencies.

## Training Plan

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

**Business Skills:** This training will be offered to all occupations and focus on business processes and operations, customer service and product knowledge. Training will improve and increase employee skills to work more effectively and efficiently.

**Computer Skills:** This training will be offered to all occupations. Training will help trainees to become more proficient in the use of the Company's various software applications necessary to provide efficient and effective customer services and tools to effectively perform their job functions.

**Continuous Improvement:** This training will be offered to all occupations to improve product quality, process improvement and reduce costs while moving to the high performance workplace.

**Hazardous Materials Skills:** This training will be offered to all occupations. Trainees will learn proper techniques, knowledge and communication on handling hazardous materials and emerging practice safety protocols.

**Manufacturing Skills:** This training will be offered to all occupations. Training will help trainees maintain, operate and improve highly automated equipment and systems and best manufacturing

and operational practices. It will also upgrade worker's job skills, delivery flexibility, and increase production to meet customers' demands.

### **Commitment to Training**

Rockview has an annual training budget of approximately \$200,000 for its Downey and Southgate locations. Training consists of Food Safety, standard operating procedures, FDA compliance, and mandated safety training and sexual harassment prevention. Most training is delivered via lass/lab.

ETP funds will support Rockview's ongoing financial commitment to training and allows the Company to implement changes throughout the organization to meets its goals. After the completion of the ETP training, the Company is committed to continuing the quality and frequency of employee 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 is scheduled to begin upon Panel approval. Training will be delivered on-site by 11 in-house experts who have have at least 15 years of experience in the manufacturing industry, and vendors if needed. Rockview has designated a Director of Safety and Loss Prevention and Training Coordinator at each facility to document training rosters, monitor, oversee ETP training and all administrative responsibilities including scheduling, managing and delivery of training. The Company will also utilize a third party administrator to assist with the administrative process for enrollment, data tracking, invoicing, participate in ETP monitoring activities and ensure compliance with all ETP requirements.

### **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 \$ %
ET21-0205	Downey and Southgate	12/14/20 – 12/13/22	\$131,721	\$131,721(100%)

### **DEVELOPMENT SERVICES**

Rockview retained Training Funding Partners in Fountain Valley to assist with development of this proposal for a flat fee of \$7,866.

### **ADMINISTRATIVE SERVICES**

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

### **TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Business Acumen Skills
- Communication Skills
- Customer Service Skills
- New/Updated Product Knowledge Skills

**Computer Skills**

- Intermediate/Advanced Microsoft Office Suite
- Rockview Proprietary System Skills

**Continuous Improvement Skills**

- Business Process Management skills
- Change Management Skills
- Project Management Skills
- Quality/Process Improvement Skills
- Situational Leadership Skills

**Hazardous Materials Skills**

- Hazardous Materials

**Manufacturing Skills**

- Advanced Safety/Food Safety Skills
- Equipment Maintenance/Machine Operation Skills
- Good/Lean Manufacturing Skills
- Manufacturing Process Cross Training
- Preventative Controls Qualified Individual (PCQI)
- Safe Quality Skills Training
- Sanitation/Chemicals Skills
- Work Process/Production Skills

# TEAMSTERS AUTOMOTIVE, INDUSTRIAL, THEME PARK, SERVICE SECTOR AND ALLIED WORKERS LOCAL UNION NO. 495

---

**DAMASCUS CASTELLANOS**  
*Secretary-Treasurer*



**ART CARRILLO**  
*President*

December 1, 2022

## **EMPLOYMENT TRAINING PANEL**

1100 J Street  
Sacramento, CA 95814

Dear Panel Members,

We understand Rockview Dairies, Inc. is requesting ETP funding. The proposed training plan for the specified members has our support.

Approximately 10 trainees from the following occupations will be participating in this project:

- Customer Service
- Accounting

The Union with respective Local 495 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,

**TEAMSTERS AUTOMOTIVE, INDUSTRIAL, THEME PARK  
SERVICE SECTOR AND ALLIED WORKERS LOCAL NO. 495**

A handwritten signature in blue ink, which appears to read "Damascus Castellanos", is written over the typed name and title.

Damascus Castellanos  
Secretary-Treasurer

DC:re



# TEAMSTERS

## LOCAL UNION NO. 63

Freight, Parcel,  
Bakery, Dairy,  
Meat, Poultry  
and Factory  
Workers in the  
Los Angeles  
Metropolitan  
Area.

General Truck  
Drivers,  
Warehousemen  
and Helpers in  
Los Angeles,  
San Bernardino,  
Riverside  
Counties,  
California.

Agricultural and  
Related Product  
Workers in the  
California  
Counties of San  
Diego, Imperial,  
Orange,  
Alameda,  
Los Angeles,  
San Bernardino,  
Ventura, Santa  
Barbara, Kern,  
San Luis  
Obispo, Tulare,  
Kings,  
Monterey, San  
Benito, Fresno  
and Merced.

955 Bloomington  
Ave.  
Bloomington, CA  
92316  
(626) 859-4005  
FAX  
(626) 859-4084

379 W. Valley  
Blvd.  
Rialto, Calif.  
92376  
(909) 877-4760  
FAX  
(909) 877-2452

October 10, 2023

Employment Training Panel  
1100 J Street  
Sacramento, CA 95814

Dear Panel Members,

We understand Rockview Dairies, Inc. is requesting ETP funding. The proposed training plan for the specified members has our support.

The approximate number of 170 trainees from the following occupations will be participating in this project:

- Logistics Staff
- Maintenance Staff
- Production Staff

The Union with respective Local(s) 63 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,

Carlos Barnett  
Business Representative  
Teamsters Local 63  
CB/jr



**Training Proposal for:**  
**Silgan Containers Manufacturing Corporation**

**Contract Number: ET24-0253**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Contra Costa, Los Angeles, Stanislaus	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Cannery and Food Processing Jurisdiction in Fresno, Merced and Stanislaus Counties, California, Teamsters Local Union #948; International Association of Machinists and Aerospace Workers, Local Lodges 1528-Modesto and 2182-Sacramento		
Number of Employees in:	CA: 550	U.S.: 7,500	Worldwide: 15,600
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	5%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$333,740

<b>Total ETP Funding</b>
\$198,720

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Impr., Mfg. Skills	192	8-200	0	\$1,035	\$22.66
				Weighted Avg: 45			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$23.59 per hour for Contra Costa and \$22.66 for Los Angeles and Stanislaus Counties

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

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

Up to \$2.46 per hour may be used to meet the Post-Retention Wage.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Maintenance Staff	\$20.99 - \$25.00	15
	\$25.01 - \$42.54	80
Managers/Supervisors	\$28.80 - \$50.00	10
Manufacturing Staff	\$20.20 - \$25.00	14
	\$25.01 - \$38.00	73

**INTRODUCTION**

Founded in 1987 and headquartered in Woodland Hills, Silgan Containers Manufacturing Corporation (Silgan) (<https://silgancontainers.com/>) manufactures and markets metal food grade packaging for food and beverage manufacturing companies. Silgan's customers include Campbell Soup, Coca-Cola, Nestle and many more. Training will take place at the Company's California locations in Antioch, Modesto, Riverbank and Woodland Hills. This is Silgan's first ETP Contract.

**Veterans Program**

Silgan actively recruits Veterans and works with organization such as Corporate American Supports You to recruit military and Veteran job seekers. For ease of administering the Contract, Veteran trainees will be included in Job Number 1.

**Union Support**

Approximately 82 Maintenance and Manufacturing employees are represented by Cannery and Food Processing Jurisdiction in Fresno, Merced and Stanislaus Counties, California, Teamsters Local Union #948 and approximately 100 Maintenance and Manufacturing employees are represented by International Association of Machinists and Aerospace Workers, Local Lodges

1528-Modesto and 2182-Sacramento. The unions have submitted a letter of support for this training project.

## **PROJECT DETAILS**

Global demand for metal food packaging is expected to grow at a compound annual growth rate of 3.1% from 2021 to 2030. The growth is driven by a number of factors which include the increasing demand for food and beverages, the growth of e-commerce, and the rising focus on sustainability. To keep up with industry and customer demand, Silgan needs to continue to develop innovative products and solutions and implement process improvements including waste elimination which includes recycling food packaging. For the Company to implement process improvements and meet customer demand, new equipment will be installed including a new heat exchanger section added to the existing oxidizer, a pin hole detector, a new chiller, and vision inspection cameras on the packaging system. In depth training will be provided to the Manufacturing and Maintenance Staff. Training will provide trainees with the knowledge of the initiatives and the operational skills to be efficient and produce high quality products.

All occupations will receive training on topics such as Products Offered, Customer Service/Support, Effective Leadership, Process/Performance Improvement, and Problem Solving/Troubleshooting. Training will provide the trainees the skills needed to be productive in their respective occupations and provide improved and consistent customer service.

In addition, Silgan will provide cross training to all occupations with opportunities to advance into higher paying positions. Silgan will also provide management opportunities through the Company's in house manager training program. Training will ensure they have the skills required to accurately manufacture the product and meet the customer needs.

## **Training Plan**

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

**Business Skills:** Training will be offered to all occupations in skills to effectively and efficiently maintain business operations. Training topics include Marketing/Sales and Customer Service/Support.

**Computer Skills:** Training will be offered to all occupations and focus on the Company's internal software. Training topics include Kronos System and WorkDay System.

**Continuous Improvement:** Training will be offered to all occupations and focus on streamlining processes. Training topics include Effective Leadership and Project Management.

**Manufacturing Skills:** Training will be offered to all occupations and focus on equipment operation. Training topics include Bag House System and Pin Hole System.

## **High Unemployment Area**

Some trainees (Job Number 1) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's locations in Stanislaus County are in an HUA. However, the Company is not requesting a wage and/or retention modification.

## **Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

**Commitment to Training**

Silgan's annual CA training budget is approximately \$321,000 and includes government-mandated safety regulations, new-hire orientation, and rudimentary job skills. Training is an ongoing initiative so Silgan 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.

➤ Training Infrastructure

The Project Manager will oversee the ETP-funded training. The Learning Administrators at each location and in-house trainers will help schedule, deliver, complete and review the rosters for accuracy. Training will be provided by in-house experts. The Company also hired an experienced third party subcontractor to help with administering the Contract.

**DEVELOPMENT SERVICES**

Training Funding Partners (TFP) in Fountain Valley assisted with development of this proposal for a fee of \$9,936.

**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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Cross-Training
- Customer Service/Support
- Marketing/Sales
- Products Offered

**Computer Skills**

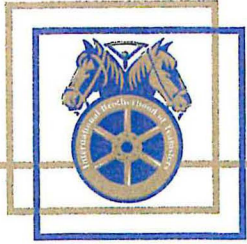
- Enterprise Resource Planning System
- Intermediate/Advanced Microsoft Office
- Kronos System
- Silgan Proprietary System
- WorkDay System

**Continuous Improvement Skills**

- Developing Teams/Goals/Objectives
- Effective Leadership
- Lean/Six Sigma Skills
- Problem Solving/Troubleshooting
- Process/Performance Improvement
- Product Development/Innovation Skills
- Project Management
- Team Development Skills

**Manufacturing Skills**

- Bag House System
- Chiller System
- Chemical Spills
- Equipment Maintenance
- Equipment Training
- Forklift Training
- Hazardous Materials
- Heat Exchanger
- Metal Food Processing
- Pin Hole System
- Product Bander
- Quality Assurance
- Sterilization Process
- Technology/Equipment
- Thermal Processing



# TEAMSTERS LOCAL UNION NO. 948

TEAMSTERS, CANNERY WORKERS, FOOD PROCESSORS & HELPERS UNION  
GENERAL JURISDICTION IN TULARE AND KING COUNTIES AND CANNERY AND FOOD  
PROCESSING JURISDICTION IN FRESNO, MERCED AND STANISLAUS COUNTIES, CALIFORNIA

Affiliated with the International Brotherhood of Teamsters

2354 W. Whitendale Avenue Visalia, California 93277  
Phone (559) 625-1061 Fax (559) 625-9269

1222 I Street Modesto, California 95354  
Phone (209) 522-9006 Fax (209) 523-3323

**LUIS DIAZ**  
Secretary Treasurer

**LUPE JUAREZ**  
President

**TIM PAROLINI**  
Vice President

**KATHLEEN ALVARADO**  
Recording-Secretary

**MONICA VARGAS**  
Trustee

**ROBERT HOUGH**  
Trustee

**JUAN IBARRA**  
Trustee

September 18<sup>th</sup>, 2023  
Employment  
Training Panel  
1100 J Street  
Sacramento, CA

Dear Panel

Members,

We understand the Silgan Container Manufacturing Corporation is requesting ETP funding. The proposed training plan for the 82 Maintenance Staff and Manufacturing Staff has our support. Teamsters Local 948 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 too 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.

Teamsters Local 948 continues to be very supportive of the Silgan Training Program in which Teamsters Local 948's members benefit by both raising their skill levels and as such they increase their ability to earn better wages, which in turn improves the lives of their families and those of all members of the community.

Sincerely,

Odus Hall  
Staff Coordinator and Business Representative

Cc, Luis Diaz Teamsters Local 948 Secretary Treasurer and Principal Officer  
Joesph Heywood Silgan Human Resources Director



# INTERNATIONAL ASSOCIATION OF MACHINISTS AND AEROSPACE WORKERS

**Local Lodges 1528-Modesto, 2182-Sacramento, 801-Reno**

**Affiliated with Machinists Automotive Trades District Lodge No. 190 of California and Nevada**

**967 VENTURE COURT-SACRAMENTO CA 95825**

(916) 708-2182 [machinists2182@gmail.com](mailto:machinists2182@gmail.com) (916) 929-3794

**I.A.M. & A.W.**

September 20, 2023

Employment Training Panel  
1100 J Street  
Sacramento, CA 95814

Dear Panel Members,

We understand the Silgan Container Manufacturing Corporation is requesting ETP funding. The proposed training plan for the 100 Maintenance Staff and Manufacturing Staff has our support.

The Union with respective Local 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,

Mark Martin  
Asst. Directing Business Representative  
District Lodge 190/LL 1528



Retrainee-Job Creation

**Training Proposal for:**

**Snak King LLC**

**Contract Number: ET24-0234**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** D. Tran

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 212	U.S.: 508	Worldwide: 508
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$339,200

<b>Total ETP Funding</b>
\$153,640

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills; Management Skills; Manufacturing Skills; Continuous Impr; OSHA10/30; PL-Manufacturing Skills;	147	8-200	0	\$920	\$22.66
				Weighted Avg: 40			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills; Management Skills; Manufacturing Skills; Continuous Impr; OSHA10/30; PL-Manufacturing Skills;	20	8-200	0	\$920	\$20.16
				Weighted Avg: 40			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$22.66/Hour (Retrainee/Priority Industry) in Los Angeles County. Job Number 2: \$18.78/Hour (Job Creation) in Los Angeles County.

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

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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff	\$20.16 - \$25.00	2
	\$25.01 - \$62.50	14
Production Staff	\$20.16 - \$23.85	47
Quality Staff	\$20.16 - \$25.00	5
Technical Staff Maintenance	\$20.16 - \$25.00	8
	\$25.01 - \$41.04	14
Warehouse & Receiving	\$20.16 - \$25.00	25
	\$25.01 - \$38.46	2
Supervisor/Manager	\$25.01 - \$85.10	30
<b>Job Number 2</b>		
Production Staff	\$20.16 - \$23.85	10
Warehouse & Receiving	\$20.16 - \$25.00	10

**INTRODUCTION**

Snak King LLC (Snak King) (<https://www.snakking.com/>), founded in 1978 and headquartered in the City of Industry, is a snack food manufacturing company. The Company specializes in producing a wide range of snack products, including popcorn, tortilla chips, cheese puffs, pork rinds, and other savory snacks. Snak King is known for its diverse portfolio of snack brands and products, catering to various tastes and preferences of consumers.

The Company has grown to become prominent in the snack food industry. The Company's mission is to create high quality, flavorful snack options for consumers, with an emphasis on using quality ingredients and innovative flavors in its products. The Company also has a significant presence in the private label and co-packaging segments, collaborating with various retailers and other snack food companies to manufacture and package snacks under different brand names. Training will take place at its location in City of Industry. This will be Snak King's first ETP contract.

### **Veterans Program**

The Company does not have a specific veterans recruitment program at this time; however, the Company does currently employ veterans.

### **PROJECT DETAILS**

Snak King is experiencing significant changes to the manufacturing of products to keep up with changing industry standards of cleanliness, evolving safety standards and automation and robotic machinery innovations have shifted how companies are producing products to become leaner and more efficient, with less attrition.

The snack manufacturing industry has been subject to several changes and trends in recent years. While these trends are evolving, some key changes have affected the industry as a whole. This includes health and wellness focus, diverse flavor profiles, sustainable packaging, innovative ingredients, premium artisanal snacks, and sustainable sourcing. All of these factors play a critical role in how companies move forward, and adapting to consumer changes to remain competitive across the industry.

Snak King recognizes well trained employees are better equipped to perform their job duties more efficiently. This leads to better retention, a positive impact on the business, and enhancing the operations atmosphere. The Company is preparing for a smooth transition and succession planning as its aging workforce prepares to retire. This includes preparing for extensive training, from senior employees to junior employees to fill skill gaps. Additionally, the Company recently invested approximately \$15M into new technology and equipment, including Auto Case Packers, Robotic Palletizer, and new computer software to increase production, efficiency and reduce waste. The investments in new technology and new equipment require significant amount of training to ensure employees are adequately trained and cross-trained in different functional roles. This will create a highly skilled workforce with diverse well-rounded skillsets, resulting in promotional opportunities and upward mobility within the company.

### **Training Plan**

Training will be delivered via class/lab and productive lab for the following:

**Business Skills:** this training will be offered to all occupations. Training will focus on building new skillsets for all employees so that they understand the entire business and manufacturing process. Topics include Risk management, business fundamentals, and business writing and reporting.

**Continuous Improvement:** this training will be offered to all occupations. Training will focus on enhancing workflow processes and maximizing efficiency and output while minimizing waste. Topics include inventory control, warehouse handling, and lean manufacturing.

**Management Skills:** this training will be offered primarily to Supervisors and Managers. Training will focus on developing up and coming leaders within the organization. With a large number of employees retiring soon, the Company will focus on extensive training to prepare for succession. Topics include leadership fundamentals, change management, and time management.

**Manufacturing Skills:** this training will be offered primarily to Production Staff, Quality Staff, Technical Staff Maintenance, and Warehouse & Receiving. Training will focus on ensuring all floor line employees are fully trained to fully operate machinery from beginning to end. Utilizing some of the newly installed equipment is a critical step in the successful implementation of new equipment and technology. Topics include automated case packer and corrugated loader.

### **Certified Safety Training**

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

### **Productive Laboratory (PL)**

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

Production Staff, Warehouse & Receiving, Quality Staff, and Technical Staff Maintenance occupations may receive up to 10 hours of PL in Manufacturing Skills. PL is intended to test and confirm skillsets developed on the manufacturing floor to ensure the final product output is up to the standards in place. The training will be delivered on a 1:1 basis with a dedicated instructor who will only be available to conduct PL and will verify that training was completed successfully.

### **Commitment to Training**

Snak King spends approximately \$210,000 annually on training. This training includes standard onboarding training 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.

#### **➤ Training Infrastructure**

This training project will be administered and overseen by the Vice President of Human Resources, Director of Manufacturing, Chief Operating Officer, and Vice President of Finance. Additionally, several designated administrative staff will assist in the administration of this project and will be responsible for the collection and uploading of rosters in the ETP CEF system.

### **Temporary to Permanent Hiring**

The Company will hire 20 workers (Job Number 2) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. 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**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined

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

Trainees may receive any of the following:

**Business Skills**

- Business Fundamentals
- Risk Management
- Business Writing and Reporting
- Presentation and Communication
- Business Ethics and Compliance

**Continuous Improvement Skills**

- Lean Manufacturing
- HACCP - Hazard Analysis Critical Control Points
- QMS - Quality Management System
- GMP - Good Manufacturing Practices
- Food Allergen Management
- Inventory Control
- Warehouse Handling
- Root Cause Analysis
- Regulatory Compliance
- DOMO - Business Intelligence

**Management Skills (Managers/Supervisors/Leads Only)**

- Leadership Fundamentals
- Communication Skills
- Team Building and Motivation Skills
- Conflict Resolution
- Decision Making and Problem Solving
- Time Management
- Performance Management
- Change Management

**Manufacturing Skills**

- Automated Case Packer ( ACP)
- Corrugated Loader
- Supervisory Control and Data Acquisitions (SCADA)
- Overall Equipment Effectiveness Software (Redzone)
- Process Waste Handling
- Vertical Form Fill Seal (VFFS) Machine
- Auto Palletizer (AP)
- Hazard Communications
- Safety Leadership & Culture

**Safety Skills - OSHA 10/30 (Certified-OSHA Instructor)**

- OSHA 10
- OSHA 30

**Productive Lab (Trainer-to-Trainee Ratio 1:1)**

Trainees may receive any of the following:

**Manufacturing Skills**

- Auto Case Packing ( ACP)
- Corrugated Loader
- Supervisory Control and Data Acquisitions (SCADA)
- Overall Equipment Effectiveness Software (Redzone)
- Process Waste Handling
- Vertical Form Fill Seal (VFFS) Machine
- Auto Palletizer (AP)



**Training Proposal for:**  
**University Lab Partners**  
**Contract Number: ET24-0241**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** M. Reeves

**PROJECT PROFILE**

Contract Attributes:	Retrainee SB <100 Priority Rate	Industry Sector(s):	MEC Biotechnology/Life Sciences Professional, Scientific, Technology  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, Los Angeles, San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$178,250		\$12,375 8%		\$190,625

In-Kind Contribution:	50% of Total ETP Funding Required	\$272,500
-----------------------	-----------------------------------	-----------

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Priority Rate Retrainee SB <100	Business Skills, Commer'l Skills, Computer Skills, Continuous Impr., Green/Clean Skills, HazMat, Mgmt. Skills, Mfg. Skills	125	8-200	0	\$1,525	\$22.66
				Weighted Avg: 62			

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

**Minimum Wage by County:** \$22.66 per hour for Orange, Los Angeles, and San Diego counties.

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

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

Participating employers may use health benefits up to \$2.50 per hour to meet the Post-Retention Wage.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Associate Mechanical Engineer	\$20.16 - \$25.00	2
	\$25.01 - \$36.00	5
Chief Executive Officer	\$25.00 - \$50.00	5
	\$50.01 - \$75.00	5
Chief Financial Officer	\$25.00 - \$50.00	5
Chief Operations Officer	\$25.00 - \$50.00	3
	\$50.01 - \$75.00	2
Chief Technology Officer	\$25.00 - \$50.00	3
	\$50.01 - \$75.00	2
Director of Software Engineering	\$25.00 - \$50.00	2
Director Program Management	\$25.00 - \$50.00	2
Fabrication Assistant	\$20.16 - \$25.00	5
Fabrication Technician	\$20.16 - \$25.00	5
Head of Clinical Affairs	\$25.00 - \$38.00	2
Head of Design	\$25.00 - \$55.00	1
Head of R&D	\$25.00 - \$50.00	2
Junior Technician	\$20.16 - \$25.00	5
Laboratory Technician	\$20.16 - \$25.00	5
Lead Engineer	\$20.16 - \$25.00	2
	\$25.01 - \$28.00	3

Lead Scientist	\$20.16 - \$25.00	2
	\$25.01 - \$50.00	5
	\$50.01 - \$76.00	5
New Product Development Specialist	\$20.16 - \$25.00	2
Principal Data Scientist	\$25.00 - \$48.00	2
Project Manager	\$25.00 - \$57.00	2
R&D Assistant	\$20.16 - \$25.00	5
Research Assistant	\$20.16 - \$25.00	5
	\$25.01 - \$30.00	10
Senior Business Development Manager	\$25.00 - \$50.00	2
Senior Firmware Engineer	\$25.00 - \$59.00	2
Senior Mechanical Engineer	\$25.00 - \$50.00	2
Senior Technician	\$25.00 - \$30.00	5
Small Business Owner	N/A	10

## **INTRODUCTION**

Founded in 2019, University Lab Partners (ULP) ([www.universitylabpartners.org](http://www.universitylabpartners.org)) is an independent, non-profit organization established in partnership with the Beall Family Foundation at the University of California – Irvine. ULP is headquartered in Irvine and provides hands-on training in biomedical, life science and laboratory testing. The Organization offers exceptional value to life science entrepreneurs looking to launch and grow their business in the biomedical industry. ULP is a wet lab incubator that serves the life science and biotechnology industries by providing training for both incumbent and new hire workers in highly technical fields. In addition, ULP provides business skills training that includes marketing, finance, human resources, and legal topics.

ULP works closely with biotechnology, medical technology, and life science companies to upgrade the skills of their workforce in an effort to maintain their competitiveness in California. The Organization also serves as an innovation hub for life science resources and activities in the Southern California ecosystem through thought-leadership events and resources for start-up companies. Finally, ULP takes an active role in developing talent through workforce development activities to create sustainable, living wage careers in the community. Such outreach and programming include K-12 outreach to develop the talent pipeline by bringing more students into the life science/medical technology sector.

The Organization is eligible to contract with ETP as a Group of Employers, under Title 22, California Code of Regulations (CCR), Section 4400(j)(3). As a wet lab incubator, ULP's core group of small business participating employers is all located at a single facility and share the same physical address. This will be ULP's second ETP Contract.

## **Veterans Program**

This project does not include a separate Veterans component; however, ULP plans to market training opportunities to Veterans through Workforce Investment Boards and Regional Occupational Programs.

## **PROJECT DETAILS**

ULP has invested more than \$3 million in highly technical scientific equipment (fluorescence microscopes, laboratory equipment, imagers, spectrophotometer, laser cutter, 3D printers, etc.) to provide vital training to individuals working in and/or entering the industry. The life science, biotechnology and medical technology industries are constantly advancing and evolving. Companies, particularly small businesses, must send their employees to specialized training facilities like ULP that can provide hands-on training in a highly technical laboratory environment. In addition, many scientists, researchers, and business owners lack the business skills and education to launch and grow a company.

Participating employers are under pressure to produce new diagnostic testing, therapeutics, and other new technologies for meeting the needs of the healthcare industry. In addition, the research and development process requires significant amounts of training on expensive, specialized equipment. Following the COVID-19 pandemic, the Food and Drug Administration has also ushered in many changes for drug/medical device approvals that require innovative minds to interpret industry updates. As a result, employers have expressed an increasing need for experienced, highly-skilled technical workers. ULP's training program equips individuals with knowledge and skills that result in a much flatter learning curve in the workplace. ULP also works in partnership with leading mentors to provide entrepreneurship courses to help start-up founders become successful in building their businesses.

The proposed training will provide employers the opportunity to sustain their overall competitiveness, improve productivity, create new businesses and job opportunities, increase wages, and remain current in rapidly changing biotechnology and life science technologies.

### **Training Plan**

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

**Business Skills:** This training will be offered to all occupations to improve communication, marketing skills, data analysis, and project management. Small Business Owners will also receive entrepreneurship skills to help them become more effective leaders of organizations.

**Commercial Skills:** This training will be offered to all occupations in proper equipment operation and procedures, research and laboratory protocols, and complex laboratory techniques.

**Computer Skills:** This training will be offered to all occupations and will teach the work more efficiently through the use of industry-related software applications, including modeling and diagramming technology.

**Continuous Improvement:** This training will be offered to all occupations to improve laboratory protocols and quality control programs. Trainee will learn the importance of maintaining a clean laboratory working environment.

**Green/Clean Skills:** This training will be offered to all occupations. Areas of emphasis will include renewable energy, green building technology, clean transportation, water management, and climate change.

**Hazardous Materials:** This training will be offered to all occupations and will teach skills necessary to handle, dispose, and clean up hazardous bio waste materials in the course of their daily activities. This training will promote a safe workplace.

**Management Skills:** This training will be offered to the small business executive leadership team (CEO, CFO, COO), Directors, Managers, and Owners to enhance their ability to communicate, lead, motivate and plan.

**Manufacturing Skills:** This training will be offered to Fabrication Assistants, Technicians, and Engineers. This training is designed to improve production efficiency, product quality and safety.

### **Alternate Recordkeeping**

Staff has reviewed and approved the ULP's request to use an alternate recordkeeping method.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. Most of the participating small business employers lack the resources to conduct structured training on a regular basis. The majority provide company orientation, sexual harassment prevention, violence in the workplace prevention, and basic on-the-job training. 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 employees with a broader spectrum of skills development and introduce them to new products, technology and procedures. Safety training is provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

ULP's Executive Director and Site Director will oversee administration of this project. Three additional staff members (Senior Administrative Specialist, Senior Marketing Coordinator, Education Program Manager) round out the project administration team that will handle the coordination of marketing, recruitment, needs assessments, enrollment, scheduling classes, and documentation of training. The Organization has a training schedule in place and is prepared to commence training upon Contract approval.

### **Impact/Outcome**

Upon completion of training, trainees will receive laboratory procedures and equipment certification as dictated by participating employers. In addition, some courses such as the Molecular Biology Laboratory Techniques and Mammalian Cell Culturing are credentialed through the University of California - Irvine, Department of Continuing Education.

### **Marketing and Support Costs**

ULP has a well-established marketing relationship with Workforce Investment Boards, Regional Occupational Programs, local nonprofit organizations, as well as industry associations such as the California Life Science Association and Biocom. Staff have built strong relationships with many companies' personnel to promote training opportunities. Staff utilize the following avenues to market training programs: seminars, meetings, thought-leadership events, emails, newsletters, websites, meetings with local employers, and collaborative networks of businesses. ULP requests and staff recommends 8% support costs to assist with recruitment and training assessments.

**Trainer Qualifications**

Training will be provided by ULP's in-house experts. In-house trainers are certified by ULP and the University of California – Irvine. In-house trainers are competent in the subject matter they train on and will have completed all classes required for the proficiency in each topic of training prior to delivery of training on that topic. Outside professional experts may be used when specific technical skill are required, and unavailable by ULP trainers.

**Tuition Reimbursement**

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

**PRIOR PROJECTS**

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

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET21-0324	Irvine	06/28/21 - 06/27/23	\$143,172	\$143,172 (100%)

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Communications
- Marketing Skills
- Data Analysis
- Effective Interviewing Skills
- Resume Building
- Workplace Etiquette
- Entrepreneurship Skills
  - Business Structure and Formation
  - Intellectual Property
  - Financial Strategies
  - Business Essentials
  - Business Model
  - Product Market Fit
  - Go-to-Market Strategy
  - Leadership and Development
  - Advisory Board
  - Financial Projection
  - How to Pitch
  - Human Resources
  - Seeking Non-Diluted Funding
  - Fundraising
- Project Management
- Customer Service
- Sales

**Commercial Skills**

- Molecular Biology Laboratory Techniques
- Mammalian Cell Culture Techniques
- Principles of Flow Cytometry
- Nanofiber/Electric Spinning Techniques
- General Laboratory Equipment Training
- High-Performance Liquid Chromatography (HPLC) Methods and Fundamentals
- Laboratory Techniques

**Computer Skills**

- Computer Assisted Drawing (CAD)
- Data Report Generation
- Advanced Microsoft Applications Training
- Computer Programming

**Continuous Improvement Skills**

- Laboratory Safety Protocols
- Quality Control Programs

**Green/Clean Skills**

- Renewable Energy Skills
- Sustainable Agriculture skills
- Energy Efficiency Skills
- Waste Management Skills
- Green Building Skills
- Environmental Science Skills
- Clean Transportation Skills
- Water Management Skills
- Climate Change Mitigation and Adaptation Skills

**Hazardous Materials Skills**

- Hazardous Materials Handling, Storage, and Disposal

**Management Skills (Managers/Supervisors/Leads Only)**

- Strategic Planning
- Time Management
- Business Planning and Strategy
- Employee Coaching/Motivation
- Financial Management
- Customer Sales
- Leadership Development
- Conflict Resolution
- Decision Making/Business Ethics

**Manufacturing Skills**

- Fabrication Methods and Materials
- Manufacturing Equipment Training
- Manufacturing Lab Training

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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

Contractor's Name: University Lab Partners

CCG No.: ET24-0241

Reference No: 24-0053

Page 1 of 9

ALPHABETIZE BY COMPANY NAME

Company: ACGENE Lab

Priority Industry? ☒ Yes ☐ No

Address: 5270 California Ave, Suite 300

City, State, Zip: Irvine, CA 92617

Collective Bargaining Agreement(s): N/A

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 3

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

Company: AJK Biopharmaceutical

Priority Industry? ☒ Yes ☐ No

Address: 5270 California Ave, Suite 300

City, State, Zip: Irvine, CA 92617

Collective Bargaining Agreement(s): N/A

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 1

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

Company: ARNA Genomics

Priority Industry? ☒ Yes ☐ No

Address: 5270 California Ave, Suite 300

City, State, Zip: Irvine, CA 92617

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: 4

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

Company: AVITA Medical Americas

Priority Industry? ☒ Yes ☐ No

Address: 5270 California Ave, Suite 300

City, State, Zip: Irvine, CA 92617

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Contract: 11

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 98

Total # of full-time company employees in California: 11

ALPHABETIZE BY COMPANY NAME

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: University Lab Partners		CCG No.: ET24-0241
Reference No: 24-0053		Page 2 of 9
<hr/>		
Company: AYA Digital		Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300		
City, State, Zip: Irvine, CA 92617		
Collective Bargaining Agreement(s): N/A		
Estimated # of employees to be retrained under this Contract: 3		Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 3		
Total # of full-time company employees in California: 3		
<hr/>		
Company: Bio Creative Enterprises DBA Bio Creative Labs		Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300		
City, State, Zip: Irvine, CA 92617		
Collective Bargaining Agreement(s): N/A		
Estimated # of employees to be retrained under this Contract: 3		Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 3		
Total # of full-time company employees in California: 3		
<hr/>		
Company: Botanisol Analytics		Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300		
City, State, Zip: Irvine, CA 92617		
Collective Bargaining Agreement(s): N/A		
Estimated # of employees to be retrained under this Contract: 2		Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 2		
Total # of full-time company employees in California: 2		
<hr/>		
Company: Cercacor Laboratories		Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300		
City, State, Zip: Irvine, CA 92617		
Collective Bargaining Agreement(s): N/A		
Estimated # of employees to be retrained under this Contract: 5		Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 5		
Total # of full-time company employees in California: 5		

ALPHABETIZE BY COMPANY NAME

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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

Contractor's Name: University Lab Partners	CCG No.: ET24-0241
Reference No: 24-0053	Page 3 of 9

Company: Crescenta Biosciences	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 8	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 8	
Total # of full-time company employees in California: 8	

Company: CytoRecovery	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 1	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 1	
Total # of full-time company employees in California: 1	

Company: Doric Pharma	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 1	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 1	
Total # of full-time company employees in California: 1	

Company: ElectroNucleics	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 2	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 2	
Total # of full-time company employees in California: 2	

ALPHABETIZE BY COMPANY NAME

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: University Lab Partners		CCG No.: ET24-0241
Reference No: 24-0053		Page 4 of 9

Company: Endomet Biosciences, Inc. DBA EndoCyclic Therapeutics	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 1	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 2	
Total # of full-time company employees in California: 2	

Company: Entelexo Biotherapeutics	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 5	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 5	
Total # of full-time company employees in California: 5	

Company: GBI Diagnostics	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 2	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 2	
Total # of full-time company employees in California: 2	

Company: Kalman	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 2	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 2	
Total # of full-time company employees in California: 2	

ALPHABETIZE BY COMPANY NAME

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: University Lab Partners		CCG No.: ET24-0241
Reference No: 24-0053		Page 5 of 9

Company: Leonhardt's Launchpads by Cal-X Stars Business Accelerator	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 4	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 4	
Total # of full-time company employees in California: 4	

Company: Makani Science	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 2	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 2	
Total # of full-time company employees in California: 2	

Company: Matrogenix	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 4	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 4	
Total # of full-time company employees in California: 4	

Company: Normoxi	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 1	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 1	
Total # of full-time company employees in California: 1	

ALPHABETIZE BY COMPANY NAME

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: University Lab Partners	CCG No.: ET24-0241
Reference No: 24-0053	Page 6 of 9

Company: NovoGlia	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 1 University Drive	
City, State, Zip: Aliso Viejo, CA 92656	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 3	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 3	
Total # of full-time company employees in California: 3	

Company: OrganaBio	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 4	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 4	
Total # of full-time company employees in California: 4	

Company: Paradigm Immunotherapeutics	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 3	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 3	
Total # of full-time company employees in California: 3	

Company: Phaeno	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 2	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 2	
Total # of full-time company employees in California: 2	

ALPHABETIZE BY COMPANY NAME

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: University Lab Partners	CCG No.: ET24-0241
Reference No: 24-0053	Page 7 of 9

Company: Pretika	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 2	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 2	
Total # of full-time company employees in California: 2	

Company: Scientific Horizons Consulting	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 12	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 12	
Total # of full-time company employees in California: 12	

Company: Siege Pharmaceuticals	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 1	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 1	
Total # of full-time company employees in California: 1	

Company: StoreDot US	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 5	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 5	
Total # of full-time company employees in California: 5	

ALPHABETIZE BY COMPANY NAME

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: University Lab Partners	CCG No.: ET24-0241
Reference No: 24-0053	Page 8 of 9

Company: Syntr Health Technologies	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 6	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 6	
Total # of full-time company employees in California: 6	

Company: TechImmune	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 3	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 3	
Total # of full-time company employees in California: 3	

Company: Translucence Biosystem	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 6	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 6	
Total # of full-time company employees in California: 6	

Company: Vena Vitals	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300	
City, State, Zip: Irvine, CA 92617	
Collective Bargaining Agreement(s): N/A	
Estimated # of employees to be retrained under this Contract: 12	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 12	
Total # of full-time company employees in California: 12	

ALPHABETIZE BY COMPANY NAME

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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

Contractor's Name: University Lab Partners		CCG No.: ET24-0241
Reference No: 24-0053		Page 9 of 9
Company: Visus Therapeutics		Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Address: 5270 California Ave, Suite 300		
City, State, Zip: Irvine, CA 92617		
Collective Bargaining Agreement(s): N/A		
Estimated # of employees to be retrained under this Contract: 4		Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Total # of full-time company employees worldwide: 4		
Total # of full-time company employees in California: 4		



Retrainee-Job Creation

Training Proposal for:

**AppFolio, Inc.**

**Contract Number: ET24-0176**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate	Industry Sector(s):	Services Professional, Scientific, Technology  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Barbara, San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 990	U.S.: 1,688	Worldwide: 1,688
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	18%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$700,796

<b>Total ETP Funding</b>
\$424,166

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills; Computer Skills; Management Skills	690	8-200	0	\$345	\$22.66
				Weighted Avg: 15			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills; Computer Skills; Management Skills	289	8-200	0	\$644	\$22.66
				Weighted Avg: 28			

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

**Minimum Wage by County:** Job Number 1: \$22.66 per hour for San Diego and Santa Barbara counties; Job Number 2 (Job Creation): \$18.54 per hour for Santa Barbara and San Diego 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.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
IT/Business Systems Staff	\$25.00 - \$128.75	18
Administrative & Compliance Staff	\$24.52 - \$25.00	2
	\$25.01 - \$185.10	40
Customer Support Staff	\$22.85 - \$25.00	15
	\$25.01 - \$138.82	129
Product Development Staff	\$29.30 - \$226.11	48
Engineering Staff	\$38.46 - \$180.29	182
Finance Staff	\$22.66 - \$25.00	4
	\$25.01 - \$216.35	44
Sales & Marketing Staff	\$25.01 - \$150.00	84
Manager/Supervisor	\$25.00 - \$200.00	124
<b>Job Number 2</b>		
IT/Business Systems Staff	\$25.00 - \$102.75	10
Administrative & Compliance Staff	\$24.52 - \$25.00	2
	\$25.01 - \$185.00	20
Customer Support Staff	\$22.85 - \$25.00	6
	\$25.01 - \$138.82	57

Product Development Staff	\$29.30 - \$200.00	22
Engineering Staff	\$38.46 - \$180.29	64
Finance Staff	\$22.66 - \$25.00	1
	\$25.01 - \$150.00	22
Manager/Supervisor	\$25.00 - \$180.00	51
Sales & Marketing Staff	\$25.01 - \$150.00	34

## **INTRODUCTION**

Founded in 2006 and headquartered in Goleta, AppFolio, Inc. (AppFolio) is a cloud-based software company that specializes in providing solutions for the real estate industry. Product range caters to property management companies handling various types of properties, including single and multi-family residences, commercial properties, community associations and student housing.

The Company has two facilities in California (Goleta and San Diego), and a facility in Richardson, Texas. Only its two facilities in California will participate in this proposal.

### **Veterans Program**

Although this project does not include a Veterans component, the Company encourages Veterans to apply.

## **PROJECT DETAILS**

This will be AppFolio's third ETP Contract, and the third in the last five years. Prior training focused on new software and products developed by Appfolio that required training for staff to acquire skills, knowledge and proficiency to use and introduce to customers. The Company also trained employees in best business practices and customers service.

For this proposal, AppFolio must continue to train its workforce to operate, maintain, and support the Company's new products and software upgrades on existing ones that involve complex systems and sophisticated technology. The curriculum is a mixture of topics from AppFolio's prior contract and topic upgrades which are offered as both foundational level of development for new employees and advance level for incumbent employees who had received the basic level of the training for these topics. Accordingly, no trainee will receive duplicate training from the prior contract since AppFolio aims to provide continuous development and progressive learning opportunities for their employees that is integral to building the evolving skillsets required in today's dynamic job market. Furthermore, continuous training will enhance job security, provide employees with the necessary tools to be successful in their jobs and contribute to the Company's success. To achieve these goals, AppFolio invests significantly in employee development, cultivating the talent required to deliver exceptional services and stay at the forefront of innovation, making them a clear choice for its customers.

Employees throughout the organization have access to tailored training and learning programs designed for both the entire workforce and specific employee audiences. In this ETP proposal, employees will receive training on new internal technology innovations, such as the AppFolio stack, the impact of Large Language Model AI (like ChatGPT) on user experience technology, and the newly installed Workday Learning software.

A deep understanding of AppFolio's business and strategic decision-making skills are vital for navigating the ever-changing environment and ensuring growth and scalability. The highly

customized training aims to enhance employees' comprehension of AppFolio's financial and operational performance, empowering them to make essential strategic decisions for the business.

The proposal's training will specifically focus on creating a better learning and onboarding experience for new hires, enabling a seamless transition to confidently perform their job duties and resulting in higher retention rates. Additionally, the training aims to provide ongoing development throughout employees' careers, closely aligned with the evolving needs of the business.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract.

AppFolio is expanding its workforce to respond to its growth strategy that include sales expansion of AppFolio solutions to new real estate industry markets, and an expanding customer base of housing types outside of multi-family and single-family residential. The Company expects to hire 289 new employees (Job Number 2) at the Goleta and San Diego locations.

In the last six months AppFolio hired 62 full-time employees and has hired a total of 80 full-time employees in California since the beginning of 2023. The Company plans to hire an average of 13.76 hires per month during the first year and approximately 124 more in the succeeding year. As of today's date, AppFolio employee count has increased by 218 employees since their last ETP contract.

### **Training Plan**

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

**Business Skills:** Training will be offered to all occupations to gain broader understanding of the business process, general financial and accounting knowledge, and specifics of the SaaS industry and the subscription-based business model which are essential to succeed in the technical industry.

**Computer Skills:** Training will be offered to all occupations and include highly technical skills to effectively use the Company's hardware and software programs as well as operation systems to provide efficient and effective customer service. Trainees will be trained on new internal technology innovation and gain proficiency in navigating specialized functional systems.

**Management Skills:** Training will be offered to Managers. Career growth for many knowledgeable workers takes the form of promotion into management roles. Training employees on management and leadership skills will ensure they have future opportunities for employment in management roles.

### **Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

### **Commitment to Training**

AppFolio has an annual training budget of approximately \$672,000 for all California facilities (Goleta and San Diego). Training consists of new hire orientation, mandated training, extensive

and basic computer skills, leadership and product knowledge. Training is delivered via class/lab and Zoom platform, and all training is both job specific and Company-wide.

ETP funds will not displace the existing financial commitment to training. After the completion of the ETP training, the Company will continue to provide its workforce the skillsets they need to develop and grow within the Company. Enhancing employee's skills will create additional sales, increase profits and business growth.

#### ➤ Training Infrastructure

Training will begin upon Panel approval. AppFolio has a dedicated Learning & Development team, who will administer the ETP project, headed by the Director of Learning & Development who will oversee the project, assisted by a Senior Manager of Learning & Development, Manager of Learning & Development and a Senior Learning & Development Coordinator to supervise and implement ETP training and administrative responsibilities. The Company has also retained a third party to assist with administrative duties. Training will be delivered by in-house experts and vendors as needed.

AppFolio has adopted a hybrid workplace model where employees are expected to be in the office several days per week, with the option to be flexible on working remotely on the other days. With this model, AppFolio offers a combination of virtual instructor-led training and in-person training. The in-person trainings are coordinated centrally by Learning & Development staff and is supported in local offices by Human Resources & team members from each facility.

### **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 \$ %
ET22-0110	\$429,410	08/20/21 – 08/19/23	\$429,410	\$418,718 (98%)
ET19-0345	Goleta	12/10/18 – 12/09/20	\$273,832	\$273,832 (100%)

### **DEVELOPMENT SERVICES**

Aescher Consulting in Pasadena assisted with development 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Agile Processes
- Ally Skills
- Authentic Leadership
- Business Acumen
- Business Development
- Career Development
- Change Management
- Client Services
- Coaching Skills
- Collaboration
- Communication Styles
- Conflict Management
- Customer Care
- Customer Experience
- Customer Success
- Delegation
- Difficult Conversations
- Effective One-on-Ones
- Employee Engagement & Action Planning
- Engineering & Product Training
- Engineering & Product Onboarding
- Engineering Academy
- Financial Acumen
- Goal-Setting
- Growth & Partnerships
- Industry Trends
- Innovation
- Leadership Styles
- Leading Teams
- Market Validation
- Marketing Operations
- Marketing Skills
- Meeting Management
- Networking
- Organizational Acumen
- Presentation Skills
- Product Management Skills
- Product Training
- Productive Interactions
- Project Management
- Quality Assurance

- Software as a Service (SaaS) Business
- Sales Operations
- Strategic Planning
- StrengthsFinder
- Team Strengths
- Time Management
- User Experience
- Value Added Services
- Web Operations

**Computer Skills**

- Administrative Software
- Adobe Suite
- ADP (Automatic Data Processing)
- Apple Software
- Billing and Internal Apps
- Business Systems
- Convercent
- Coupa
- Customer Experience Software
- Customer Success Software
- Expensify
- Facilities Software
- Finance Software
- Google Suite (Intermediate/Advanced)
- How to Release APM
- HTTP and Web Authentication
- HR Software
- IT Software
- JavaScript
- Jhana
- Jobvite
- KnowBe4
- Learning Management Systems
- MacOS Basics
- Marketing Systems & Software
- Marketo
- Mobile Devices
- Modern Health
- Okta
- Peakon
- React
- Ruby and Command Line Basics
- Ruby on Rails
- Rubymine
- Sales Software
- Salesforce
- Slack

- Skilljar
- Software as a Service (SaaS) Business
- SQL (Structured Query Language)
- Tenant Transactions
- Navan
- Workday
- Zoom

**Management Skills (Managers/Supervisors Only)**

- Coaching
- Engineering Management
- General Management
- Leadership Series
- Managing @ AppFolio
- Manager Workshop Series
- Performance Management
- Sales & Marketing Management



Retrainee-Job Creation

**Training Proposal for:**

**Entegris, Inc.**

**Contract Number: ET24-0220**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Manufacturing   Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Luis Obispo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 385	U.S.: 2,000	Worldwide: 5,800
<u>Turnover Rate:</u>	8%		
<u>Managers/Supervisors:</u> (% of total trainees)	9%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$398,413

<b>Total ETP Funding</b>
\$391,000

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills, Cont. Impr., HazMat, Mfg. Skills, OSHA 10/30	310	8-200	0	\$1,150	\$22.66
				Weighted Avg: 50			
2	Retrainee Job Creation Priority Rate	Computer Skills, Cont. Impr., HazMat, Mfg. Skills, OSHA 10/30	25	8-200	0	\$1,380	\$21.00
				Weighted Avg: 60			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$22.66 per hour in San Luis Obispo County  
Job Number 2 (Job Creation): \$18.54 per hour in San Luis Obispo 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 \$1.66 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Production	\$21.00 - \$25.00	6
	\$25.01 - \$35.00	6
Buyer	\$35.41 - \$38.48	7
Sales Assistant	\$24.07	1
Scheduler	\$34.66 - \$46.19	6
Engineer	\$29.00 - \$87.41	42
Technical Writer	\$50.00 - \$60.00	1
Clerk	\$25.00 - \$35.00	1
Lead	\$40.04 - \$65.62	3
Coordinator	\$30.00 - \$40.00	1
Designer	\$45.00 - \$54.60	5
Logistics	\$30.00 - \$40.00	1
Handler	\$21.00 - \$25.00	5
	\$25.01 - \$35.00	8
Lab Technician	\$29.00 - \$45.00	4

Maintenance	\$25.00 - \$28.50	4
Office/Administration	\$23.01 - \$25.00	12
Operations	\$21.00 - \$25.00	20
	\$25.01 - \$41.20	32
Quality Assurance	\$23.35 - \$40.00	10
Scientist	\$41.20 - \$58.75	6
Specialist	\$31.26 - \$59.34	6
Senior Designer	\$35.00 - \$45.00	1
Technician	\$21.00 - \$25.00	30
	\$25.01 - \$40.00	55
Warehouse	\$21.50 - \$25.00	6
	\$25.01 - \$30.00	5
Manager/Supervisor	\$50.71 - \$112.50	26
<b>Job Number 2</b>		
Office Administration	\$23.00 - \$25.00	5
Lab Technician	\$29.00 - \$30.00	5
Warehouse	\$21.50 - \$25.00	5
Quality Assurance	\$23.50 - \$25.00	5
Technician	\$21.00 - \$25.00	5

## **INTRODUCTION**

Founded in 1966, Entegris, Inc. (Entegris) ([www.Entegris.com](http://www.Entegris.com)) manufactures and supplies advanced material and process solutions, specializing in gas purification for the semiconductor, life sciences and other high-technology industries. Customers include industry leaders in the semiconductor and other high-tech industries such as Intel, Samsung, KLA Corporation, Taiwan Semiconductor Manufacturing Co. The Company also has strategic partnerships and membership with the International Technology Roadmap for Semiconductors.

Headquartered in Billerica, MA, Entegris has two locations in CA located in San Luis Obispo and Fremont with various nationwide and international locations. For the purpose of this proposal, only employees in the San Luis Obispo location will participate in training. This is Entegris' first ETP Contract.

### **Veterans Program**

Although this project does not include a veteran component, Entegris employs veterans and works closely with Employment Development Department and online recruiting sites to hire these individuals.

## **PROJECT DETAILS**

Customer demands are continuously changing due to innovation, new technology, new materials and the Company must make necessary changes to remain competitive. In response, Entegris aims to open new pathways with a new green hydrogen product and expand its existing customer base.

The potential of green hydrogen to address the intermittency of solar and wind energy coupled with its combustion properties resembling that of natural gas has captured the attention of corporations, governmental bodies, and investors alike. Green hydrogen is produced through electrolysis, a process that separates water into hydrogen and oxygen, using electricity generated from renewable sources. Today it accounts for just 0.1% of global hydrogen production. However, the declining costs of both renewable electricity (accounting for ~70% of the cost of producing hydrogen) and electrolysis technology indicate that green hydrogen could be the next best investment in the world of clean energy. For many, including oil and gas players, large utilities, industries from steel to fertilizers, green hydrogen is regarded as the best solution for harmonizing the intermittency of renewables while decarbonizing the energy-hungry industrial, chemical and transportation sectors

Currently, the Company is adding an entirely new product within the green hydrogen energy sector. Entegris invested approximately \$1 million on the project and to create new lines, and processes. The Company's investment includes a significant number of resources to successfully implement the new team of employees, along with the manufacturing of a completely new line of product and training employees to prepare them on this new venture. Employees, will gain the most up-to-date and cross functional skills. Additionally, new products for an entirely new industry, Hydrogen Energy, will require a large amount of training across every department. In addition, the Company must cross-training current staff and recently hired staff on new product and manufacturing processes. ETP funds will assist in offsetting some of the costs associated with this new expansion and training.

### **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 25 new employees (Job Number 2). These occupations include Office/Administration, Lab Technician, Warehouse, Quality Assurance and Technician to fill in the new positions created by the launching of Entegris' Green Hydrogen Energy line. 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:

**Computer Skills:** Training will be offered to all occupations to gain proficiency in the use and navigation of various software platforms used by Entegris. Training will also include industry specific software/hardware and a variety of computer skills training including intermediate Microsoft office skills training.

**Continuous Improvement:** Training will be offered to all occupations to equip workers with the knowledge and skills to manage projects using higher level of Lean concepts and principles. Training will improve regulatory reporting, quality control, and implement policy and procedural changes as needed within the facilities at various levels as well as coaching, leadership, problem solving, teambuilding, communications, best practices along with Pre-Lean, Kaizen training (LSS, Green Belt, and Black Belt), solve problems, make decisions, lead, communicate and manage daily schedules.

**Manufacturing Skills:** This training will be offered to Designer, Engineer, Handler, Lab Technician, Lead, Quality Assurance, Maintenance, Production, Manager/Supervisor, Scheduler, Technician and Warehouse staff. This training will familiarize and equip employees in the proper

use, operation, maintenance and troubleshooting of equipment used in the manufacturing process. The training will allow them to work at the highest level possible, continue competing in this highly demanding market and exceed benchmark metrics.

**Hazardous Materials:** Training will be provided to all Technicians and Managers/Supervisor to ensure proper handling of hazardous materials.

### **Certified Safety Training**

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

### **Commitment to Training**

The Company’s annual CA training budget is approximately \$245,000 and includes new employee onboarding, job-specific tools/equipment skills and on-the-job training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

To ensure the success of this ETP training project, Entegris have assigned a team of five managers/supervisors representing each department of the Company. The Training Manager, Human Resources Manager, Manufacturing Manager, Engineering Manager and Test Laboratory Manager will oversee and implement the training and will meet regularly to review the progress and collection of required documents to support the training. In addition, Entegris has retained Training Grants Intelligence, Inc., a third-party consultant to assist in the administration of this project. Training will be provided by both in-house experts and outside vendors currently under consideration by the Company.

### **DEVELOPMENT SERVICES**

Training Grants Intelligence, Inc. in Redding assisted with proposal development for a flat fee of \$6,825.

### **ADMINISTRATIVE SERVICES**

Training Grants Intelligence, Inc. will also perform administrative services for a fee not to exceed 13% of payment earned.

### **TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Computer Skills**

- Oracle ERP
- Solid Works
- Pro-Engineer
- Minitab (data, statistical)
- Master Cam programing
- Real Vision
- CNC Management Software
- AutoCAD
- Visual Factory
- Microsoft Office Suite – Intermediary
- CAD Drawing
- CAD/BIM Production Detail Drawing Package
- Read/Interpret CAD Drawings

**Continuous Improvement Skills**

- Leadership Skills for Frontline Workers
- Quality Concepts
- Process Improvement
- Team Building
- Problem Solving
- Early Management
- Focus Improvement
- Material Improvement
- Organizational Capability
- Communication Skills
- Project Management
- Systems, Applications and Products
- Structural Calculations using Analysis Programs/Manual Methods
- Leadership Training
- Communications
- Key Performance Indicators
- Business Performance/Skills Enhancement
- Environmental Sustainability
- Systems, Applications and Products
- Customer Service
- Finance and Accounting
- Human Resources
- Intrapersonal Skills Training
- Introduction to Lean Six Sigma
- Project Management Systems

- Pre-Lean
- Lean

**Hazardous Materials Skills**

- Hazardous Materials
- HaZCom

**Manufacturing Skills**

- Production Equipment Operation and Maintenance
- Green Hydrogen Energy
- Gas Delivery
- Materials Science and Analytics
- Advanced Materials
- Precision Gas Mixtures
- Specialty Coatings
- Engineered Carbon
- Surface Preparation and Cleaning
- Liquid and Gas Storage and Transport
- Micro Contamination Control
- Airborne Molecular Contamination
- Wafer and Reticle Handling
- Manufacturing Excellence
- Rapid Prototyping and Customization
- Deposition
- Photolithography
- Etching
- Doping
- Annealing
- Chamber Cleaning
- Separation Science
- Membrane Science and Engineering
- Polymer Characterization and Development
- Interfacial Science
- Source of Contamination Analysis
- CNC Machines
- Manual Lathes
- Brazing Equipment
- Convolutars – Cam Driven Pleading Machines
- Material Slit Machines
- Manual Machine Lathe/Mills
- Equipment Test Stands
- Conveyor/Rotary Ovens
- Side Sealing Equipment
- Punch Presses
- Vibration Stands
- Bubble Testing Stands
- Epoxy Dispensing Machines
- Laser Marking Machines

- Cross Training in Operations and Maintenance
- Autonomous Maintenance
- Operator Process/Equipment
- Technician Processes
- Maintenance Processes
- Pneumatic Equipment Operation
- Good Manufacturing Practices
- Quality
- Troubleshooting Equipment
- Crane Training
- Lift Training

**Safety Skills - OSHA 10 (Certified-OSHA Instructor)**

- OSHA 10

**Safety Skills - OSHA 30 (Certified-OSHA Instructor)**

- OSHA 30



Retrainee-Job Creation  
**Training Proposal for:**  
**Sorenson Engineering, Inc.**  
**Contract Number: ET24-0226**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** J. Garcia

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Bernardino	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 510	U.S.: 510	Worldwide: 510
<u>Turnover Rate:</u>	15%		
<u>Managers/Supervisors:</u> (% of total trainees)	7%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$570,000

<b>Total ETP Funding</b>
\$298,080

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Manufacturing Skills Computer Skills Business Skills Continuous Improvement Skills PL-Manufacturing Skills	251	8-200	0	\$1,035	\$22.66
				Weighted Avg: 45			
2	Retrainee Job Creation Initiative Priority Rate	Manufacturing Skills Computer Skills Business Skills Continuous Improvement Skills PL-Manufacturing Skills	37	8-200	0	\$1,035	\$18.54
				Weighted Avg: 45			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:**

Job Number 1: \$22.66 per hour in San Bernardino County.

Job Number 2 (Job Creation): \$18.54 per hour 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 \$2.49 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Up to \$1.53 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
<b>Job Number 1</b>		
Engineering Staff	\$25.26 - \$37.81	15
Manager/Supervisor	\$25.19 - \$62.52	15
Operations Staff	\$20.26 - \$24.96	10
Production Worker	\$20.18 - \$24.92	156
Sales Staff	\$25.88 - \$40.57	15
Technical Staff	\$20.21 - \$24.94	25
Administrative Staff	\$20.17 - \$24.96	15

<b>Job Number 2</b>		
Administrative Staff	\$17.01 - \$20.00	2
	\$20.01 - \$24.91	2
Manager/Supervisor	\$25.16 - \$61.63	4
Engineering Staff	\$25.15 - \$36.85	5
Production Worker	\$20.13 - \$24.90	17
Sales Staff	\$25.34 - \$40.55	2
Technical Staff	\$20.19 - \$24.93	5

## **INTRODUCTION**

Founded in 1956 and located in Yucaipa, Sorenson Engineering, Inc. (Sorenson Engineering) <https://www.sorensoneng.com/>) is a manufacturing company that delivers high-volume precise micro machining products. Sorenson Engineering primarily manufactures automatic or hand screw machine products from rod, bar, or tube stock of metal, fiber, plastics, or other materials. The products of this industry consist of a wide variety of unassembled parts and are usually manufactured on a job or order basis.

The markets and customers that the Company serves include the Aerospace, Military & Defense, Space and Satellite industries, the Medical and Dental Industry, and the Automotive industry.

### **Veterans Program**

While Sorenson Engineering does not have a formal targeted Veteran program, the Company encourages Veterans to apply for open positions. Veterans are given special consideration when they apply for jobs with the Company.

## **PROJECT DETAILS**

This is Sorenson Engineering first contract with ETP since 2012. As a proponent of technological innovation within the micro-technologies industry, Sorenson Engineering has successfully cultivated strategic alliances with valued customers for the past six decades and continues to grow. In response, Sorenson Engineering has plans to increase its workforce by recruiting new employees under this proposal.

As the micro-technology sector is continually evolving, Sorenson Engineering's workforce must remain well-versed in the latest industry standards and practices. This commitment to ongoing education is critical as it empowers the team to continuously enhance the quality of products and services offered. This, in turn, enables Sorenson Engineering to deliver exceptional customer service and sustained trajectory of growth and expansion.

While Sorenson Engineering has been operating in the micro-technology industry for six decades, the recent need for expansion has underscored the importance of additional educational support for the workforce. This comprehensive training program will equip employees with the requisite skills to not only attain a higher quality level but also nurture a culture of continuous improvement. Furthermore, it will empower the team to confront challenging obstacles head-on and the development of innovative technology solutions that drive both individual and companywide advancement.

ETP funding will allow Sorenson Engineering to substantially broaden its training initiatives. This expanded offering will elevate the competency levels of staff, creating opportunities for career

growth within the organization and the broader industry. The training curriculum has been tailored to impart company-specific skills, ensuring that the workforce consistently meets high standards of customer service and job completion.

### **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 37 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.

Sorenson Engineering has experienced significant business growth due to a new product request from customer, Glenair, which has created an increased demand for services. As a result, additional workers are needed to fill this growing business demand.

### **Training Plan**

Training will be delivered via Class/lab, E-learning, and Productive Lab in the following:

**Business Skills:** This training will be offered to all trainees and will include course topics such as Business Development, Interpersonal Communication, Presenting Technical Information, Product Knowledge and Sales Techniques, Quality Control and Risk Management.

**Computer Skills:** This training will be offered to all trainees and will include course topics such as AutoCAD, Customer Relationship Management, Cyber Security, Inventory Software, and Micro Technology Solutions.

**Continuous Improvement:** This training will be offered to all trainees and will include course topics such as Change Management, Document Control, Leading Teams, Performance Management Skills, Process Mapping, Root Cause Analysis and Personal Development.

**Manufacturing Skills:** This training will be offered to Operations Staff and Production Workers, and will include course topics such as Assembly Procedures, Design Standards and Processes, Engineering Design, Equipment Operations, High-Volume Production Techniques, Machining, Plant Operations, Safety Procedures and Tool Fabrication.

### **Commitment to Training**

Sorenson Engineering has an annual training budget of \$338,000.00. Training in this program will consist of Business Skills, Continuous Improvement Skills, Manufacturing and Computer Skills. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### **➤ Training Infrastructure**

The Company will be utilizing an administrative subcontractor who will manage rosters and invoicing. Sorenson Engineering employs a Training and Development Manager who will oversee the training program. Training will be provided by internal staff consisting of Managers and Supervisors.

### **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.

Productive Lab training is necessary for hands-on instruction while using warehouse-specific heavy equipment and working in location-specific environments. Productive Lab training will be delivered by supervisors and content experts on a trainer to trainee ratio of 1:1. Supervisors will observe, evaluate, and correct trainee behavior to confirm the trainees are competently learning construction policies and procedures. There will be approximately 20 trainers selected from the current workforce who have three or more years of work experience. Productive Lab will be offered to Operations Staff and Production Workers, and will include course topics such as Electroplating Processes, Equipment Start-Up/Shut Down, and Machine Maintenance Set-Up.

Although this training will take place during revenue-generating operations, the supervisor's main focus will be on providing adequate training instruction to the trainees. Trainees will be trained up to 11 hours of Productive Lab in Manufacturing Skills Training. During Productive Lab training, workers will be observed by instructors. Their performance will be evaluated and corrective action will be taken.

The location of Productive Lab training will be the warehouse and production floor of Sorenson Engineering.

The Supervisor's productivity time will be reduced by 10% while trainees learn new job skills during productive lab training. Although income-generating work will be performed by the trainers and trainees during productive lab sessions, the supervisors' primary focus will be on training the trainees.

### **Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

### **DEVELOPMENT SERVICES**

Sorenson Engineering has retained National Training Company, Inc. in Irvine to assist with the development of this proposal for a 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Accounting/Auditing
- Building Customer Relationships
- Business Development
- Business Processes for Engineering
- Business Sustainability
- Communication Skills
- Customer Service Standards
- Goal Setting
- Improving Business Processes
- Interpersonal Communication
- Leadership Skills
- Presenting Technical Information
- Problem Solving & Resolution
- Product Knowledge and Sales Techniques
- Project Management
- Quality Control
- Quality Planning for Engineers
- Retaining Existing Customers
- Risk Management
- Time Management
- Writing Skills

**Computer Skills**

- Accounting Software
- AutoCAD
- Computer Operations
- Computer-Assisted Engineering
- Customer Relationship Management
- Cyber Security
- Electronic Invoicing
- Financial Accounting
- Inventory Software
- Micro Technology Solutions
- MS Office 365 (Advanced)
- MS Office 365 (Intermediate)
- Online Applications
- Project Management
- Scheduling Programs

**Continuous Improvement Skills**

- Change Management
- Conflict Management

- Core Capabilities
- Document Control
- Effective Communications
- Innovative Solutions
- Leading Teams
- Performance Management Skills
- Personal Development
- Process Mapping
- Productivity Assessment
- Quality Engineering
- Realizing Your Full Potential
- Root Cause Analysis
- Standard Operating Procedures
- Team Building

**Manufacturing Skills**

- Assembly Procedures
- Automotive Systems
- Chemical Processing
- Cross Training
- Design Standards and Processes
- Electroplating Processes
- Engineering Design
- Equipment Operations
- Equipment Start-up/Shut Down
- Fabrication Making
- Heat Treatments
- High-Volume Production Techniques
- Machine and Maintenance Set-up
- Machining
- Manufacturing Best Practices
- Plant Operations
- Power Systems
- Production Processes
- Safety Procedures
- Standard Operating Procedures
- Sustainable Building Design
- Tool Design
- Tool Fabrication
- Warehouse Practices

**Productive Lab (Trainer-to-Trainee Ratio 1:1)**

Trainees may receive any of the following:

**Manufacturing Skills**

- Assembly Procedures
- Cross Training

- Electroplating Processes
- Equipment Operations
- Equipment Start-up/Shut Down
- Machine Maintenance Set-up
- Tool Fabrication



Retrainee-Job Creation

**Training Proposal for:**

**Super Center Concepts, Inc. dba Superior Grocers**

**Contract Number: ET24-0238**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** M. Reeves

**PROJECT PROFILE**

Contract Attributes:	Retrainee SET HUA Job Creation Initiative	Industry Sector(s):	Retail  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Kern, Los Angeles, Orange, Riverside, San Bernardino, Tulare, Ventura	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 4,200	U.S.: 4,200	Worldwide: 4,200
<u>Turnover Rate:</u>	17%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

In-Kind Contribution
\$355,113

Total ETP Funding
\$349,965

## **TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Commercial Skills, Computer Skills, Continuous Imp., PL - Commercial Skills	75	8-200	0-20	\$660	\$41.71
				Weighted Avg: 33			
2	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Imp., PL – Commercial Skills	300	8-200	0-20	\$660	\$17.02
				Weighted Avg: 33			
3	Retrainee SET HUA Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Imp., PL – Commercial Skills	135	8-200	0-20	\$759	\$17.01
				Weighted Avg: 33			

\*Post-Retention Wage is the Contractual Wage.

### **Minimum Wage by County:**

**Job Number 1 (SET):** \$41.20 per hour Statewide

**Job Numbers 2 and 3 (SET/HUA Job Creation):** \$17.00 per hour for Kern, Los Angeles, San Bernardino, 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.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (SET)</b>		
Information Technology Staff	\$41.71 - \$49.83	23
Operations Staff	\$41.87 - \$42.71	30
Technical Staff	\$41.93 - \$42.73	10
Transportation Staff	\$41.90 - \$43.90	12
<b>Job Number 2 (SET/HUA)</b>		
Bakery Staff	\$17.05 - \$20.00	5
	\$20.01 - \$25.00	10

	\$25.01 – \$25.98	20
Cashier	\$17.43 - \$20.00	5
	\$20.01 - \$25.00	10
	\$25.01 - \$25.15	30
Customer Service Staff	\$17.24 - \$20.00	10
	\$20.01 - \$25.00	10
	\$25.01 - \$25.82	25
Frontline Manager/Supervisor	\$19.52 - \$20.00	5
	\$20.01 - \$25.00	10
	\$25.01 - \$28.97	15
Inventory Specialist	\$17.46 - \$20.00	5
	\$20.00 - \$25.00	5
	\$25.01 - \$25.63	30
Meat Cutter Staff	\$18.01 - \$20.00	5
	\$20.01 - \$25.00	10
	\$25.01 - \$26.51	20
Packer	\$17.02 - \$20.00	10
	\$20.01 - \$25.00	10
	\$25.01 - \$25.18	15
Support Staff (Administrative Assistant, Maintenance Worker, Loss Prevention Specialist, Marketing Personnel)	\$18.67 - \$20.00	5
	\$20.01 - \$25.00	10
	\$25.01 - \$25.94	20
<b>Job Number 3 (SET/HUA/Job Creation)</b>		
Bakery Staff	\$17.03 - \$20.00	3
	\$20.01 - \$25.00	4
	\$25.01 - \$25.51	4
Cashier	\$17.35 - \$20.00	4
	\$20.01 - \$25.00	4
	\$25.01 - \$25.35	10
Customer Service Staff	\$17.18 - \$20.00	8
	\$20.01 - \$25.00	8
	\$25.01 - \$25.73	8
Frontline Manger/Supervisor	\$19.47 - \$20.00	1
	\$20.01 - \$25.00	4
	\$25.01 - \$28.99	5
Inventory Specialist	\$17.32 - \$20.00	3
	\$20.01 - \$25.00	8

	\$25.01 - \$25.58	8
Meat Cutter Staff	\$17.99 - \$20.00	3
	\$20.01 - \$25.00	4
	\$25.01 - \$26.01	8
Packer	\$17.01 - \$20.00	3
	\$20.01 - \$25.00	8
	\$25.01 - \$25.76	8
Support Staff (Administrative Assistant, Maintenance Worker, Loss Prevention Specialist, Marketing Personnel)	\$18.55 - \$20.00	3
	\$20.01 - \$25.00	8
	\$25.01 - \$25.37	8

## **INTRODUCTION**

Founded in 1981, Super Center Concepts, Inc. dba Superior Grocers (Superior) ([www.superiorgrocers.com](http://www.superiorgrocers.com)) is one of the largest independently-owned grocery supercenter chains in Southern California. Superior is headquartered in Santa Fe Springs and operates more than 40 stores under the Superior Grocers banner. The stores sell name-brand and private-label merchandise in the traditional grocery departments (produce, meat, bakery), and also offers additional services such as check cashing, utility bill payment processing, and money orders. This proposal includes training for employees at approximately 49 store locations in the following cities: Bakersfield, Baldwin Park, Bellflower, Chino, City of Industry, Compton, Corona, Covina, Cudahy, El Monte, Fontana, Gardena, Huntington Park, Inglewood, Lancaster, Long Beach, Los Angeles, Lynwood, Maywood, Montebello, Moreno Valley, North Hollywood, Ontario, Oxnard, Pacoima, Palmdale, Pico Rivera, Pomona, Rialto, South El Monte, Hawthorne, La Mirada, Buena Park, Santa Ana, San Bernardino, Santa Paula, and Tulare.

This will be Superior's first ETP Contract. Training will be delivered at all store locations.

## **Veterans Program**

Superior has not included a separate Veterans component in this proposal; however, the Company does encourage Veterans to apply for job openings through its normal hiring practices.

## **PROJECT DETAILS**

The grocery supercenter industry continues to become more competitive, along with increasing changes in consumer demands. Superior is in the process of significant expansion through a combination of business acquisitions and new store openings. As Superior continues to grow, the Company must provide ample training to remain competitive, control product pricing, improve customer service, and decrease operational costs. Recent acquisitions and store openings have pushed the Company's total number of stores to 71, with the goal of reaching 100 stores by 2025.

Superior's current and anticipated growth requires continued process improvements and employee skill upgrades. In addition to customer service, product merchandising, and equipment skills training, the proposed project will cover other key areas such as frontline leadership skills, food safety standards, supply chain management, and warehouse techniques. The proposed training will focus on upgrading the skills of Superior's existing workforce, integrating new

employees, and implementing improvements to support growth and enhance organizational efficiency.

### **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.

Superior's rapid growth over the past 12 months is highlighted by the recent purchase of the Numero Uno chain of 22 Hispanic retail grocery stores in July 2023; the opening of a new store in Tulare in December 2022; and the opening of a new store in Santa Paula in September 2022. The Company plans to add an additional 30 new stores over the next two years, with each store having approximately 100 employees. As such, Superior estimates its workforce could increase by nearly 3,000 employees over the next 24 months.

In this proposal, the Company is committed to hiring 135 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.

### **Training Plan**

Training will be delivered via Class/Lab, E-Learning, Productive Lab (PL), and Computer-Based Training (CBT). In-house subject matter experts and external training vendors may be utilized to deliver training in the following:

**Business Skills:** Training will be offered to all occupations and will focus on Cost Control, Customer Service, Problem Solving, Inventory Management, Supply Chain Optimization, and Team Development.

**Commercial Skills:** Training will be offered to all occupations and will cover industry-specific skills for grocery store employees. Training will include the Bakery Process, Cash Register Operations, Equipment Skills, Inventory Control, Product Pricing, Logistics, Product Rotation, Shipping and Receiving, Transportation Procedures, Store Cleanliness Protocols, and Warehouse Procedures.

**Computer Skills:** Training will be offered to all occupations. Employees will learn to work more efficiently through the use of business software solutions. Areas of emphasis will include Bakery Management Software, Cloud-Based Computing, Point of Sale Systems, Scanner Applications, and Supply Chain Software.

**Continuous Improvement:** Training will be offered to all occupations. This training will focus on process improvements and performance standards that enhance productivity, improve quality control procedures, and reduce waste.

### **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. Training will be delivered at a 1:1 ratio.

PL training will be provided to approximately 300 Meat Cutters, Packers, Support Staff, Inventory Specialists, and Operations Staff. PL training will allow Superior to provide hands-on instruction

in a productive environment that cannot be adequately replicated in a classroom setting. This training will help new and incumbent workers achieve the competencies needed to perform their jobs with the highest level of safety and efficiency.

PL training will involve the use of food preparation equipment, forklifts, meat cutting equipment, food packing machines, inspection tools, and fleet maintenance equipment. Training will be delivered by subject matter-experts with demonstrated knowledge and expertise in the grocery industry. Production is expected to be lower during PL, as the trainer will coach and mentor trainees. Superior will provide up to 8.25 hours of PL training per trainee, which represents 25% of the weighted average hours for all trainees in Job Numbers 1-3.

### **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 0-20 hours of CBT.

### **Electronic Recordkeeping/LMS**

Staff has reviewed and approved Raymond's use of a Learning Management System (LMS) for recordkeeping.

### **Special Employment Training (SET)**

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

#### **➤ Wage Modification**

All trainees in Job Numbers 2 and 3 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 25%. The Company's locations in Kern and Tulare counties are in an HUA. The Company's locations in the following cities within the noted counties are also in an HUA: Los Angeles County (City of Industry, Compton, Lancaster, Lynwood and Palmdale); San Bernardino County (San Bernardino); and Ventura County (Santa Paula).

These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for HUA trainees by up to 25% if post-retention wages exceed the start-of-training wages.

Superior is requesting a wage modification from \$41.20 per hour to \$17.02 per hour for the 300 trainees in Job Number 2. The Company is also requesting a wage modification from \$18.54 per hour to \$17.01 per hour for approximately 25 trainees in Job Number 3.

### **Commitment to Training**

Superior has an annual training budget of approximately \$525,000 for its California locations. ETP funds will not displace the Company's existing financial commitment to training. Company-funded training includes new hire orientation, basic on-the-job training, and industry compliance training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Superior's Manager of Training and Development will oversee administration of this project. The Company's training is centralized at the headquarters facility. An additional team of approximately 40 Managers and Supervisors across all locations will assist in the coordinated effort to schedule, deliver, and document training. Training will be delivered by in-house subject matter experts and training vendors as needed. Superior has its training plan in place and is prepared to commence training upon contract approval. The Company has also retained an outside administrative consultant to assist with ETP project administration requirements.

**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: Curriculum**

### **Class/Lab/E-Learning**

Trainees may receive any of the following:

#### **Business Skills**

- Cost Control Techniques
- Customer Service
- Foods Inventory Management
- Managing Conflict with Skill and Confidence
- Merchandising
- Operating Procedures
- Pricing Integrity
- Problem Solving & Decision Making
- Resolving Complaints
- Staff Scheduling & Management
- Supply Chain Optimization
- Team Development
- Time Management

#### **Commercial Skills**

- Assembly Skills
- Bakery Processes
- Beef & Pork Sanitary Standards
- Case Sealers
- Cash Register Operation
- Cooler Maintenance & Stocking
- Equipment Cross-Training
- Equipment Operation
- Fall Prevention/Protection
- Filler Machine Operation
- Fleet Maintenance
- Food Preparation Equipment
- Food Safety Standards
- Forklift Operation
- Hand Tools Operations
- Hydraulics
- Inventory Control
- Load Break-Down Protocols
- Loading Best Practices
- Logistics
- Manufacturing Practices
- Meat Cutting Equipment
- Packing Machine Operation
- Preventative Maintenance
- Product Inspection
- Product Merchandising

- Product Pricing Methods
- Product Rotation
- Restocking Techniques
- Shipping and Receiving
- Standard Operating Procedures
- Stocking & Rotation Methods
- Store Cleanliness Protocols
- Transportation Procedures
- Warehouse Procedures
- Workstation Sanitation Methods

### **Computer Skills**

- Bakery Management Software
- Cloud-Based Computing
- Delivery Software
- Desktop Applications
- Inventory Software
- MS Office (Intermediate/Advanced)
- Order Tracking Software
- Point of Sale (POS) Systems
- Pricing Software
- Revenue Management Software
- Scanner Applications
- Supply Chain Software
- Warehouse Management Software

### **Continuous Improvement Skills**

- Communication Skills
- Food Safety Standards
- Leadership
- Operational Excellence
- Parking Lot Operations
- Performance Management
- Quality Assurance
- Sales and Marketing For Growth
- Team Work
- Warehouse Efficiency Techniques

### **Productive Lab (Trainer-to-Trainee Ratio 1:1)**

Trainees may receive any of the following:

### **Commercial Skills**

- Equipment Cross-Training
- Equipment Operation
- Fleet Maintenance
- Food Preparation Equipment
- Forklift Operation

- Meat Cutting Equipment
- Packing Machine Operation
- Product Inspection

### **Computer-Based Training**

Trainees may receive any of the following:

#### **Business Skills**

- Compliance Tracking (2 Hrs)
- Covid Procedures (1 Hr)
- Customer Service (1 Hr)
- Equipment Packaging Procedures (1 Hr)
- Facility Cleanliness (3 Hrs)
- Food Inspection Procedures (1 Hr)
- Food Processing Equipment (4 Hrs)
- Handling Difficult Customers (1 Hr)
- Product Packaging (2 Hrs)
- Sales Skills (1 Hr)
- Sanitation(2 Hrs)
- Unloading Products (1 Hr)



Retrainee-Job Creation

**Training Proposal for:**

**Newman Replacement Windows, Inc.**

**Contract Number: ET24-0219**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** San Diego

**Analyst:** S. Phillips

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative SB <100	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 79	U.S.: 79	Worldwide: 79
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$275,450

<b>Total ETP Funding</b>
\$201,250

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Comm. Skills, Comp. Skills, OSHA 10	72	8-200	0	\$1,610	\$26.91
				Weighted Avg: 70			
2	Retrainee Priority SB<100 Job Creation Initiative	Business Skills, Comm. Skills, Comp. Skills, OSHA 10	53	8-200	0	\$1,610	\$26.91
				Weighted Avg: 70			

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

**Minimum Wage by County:** Job Number 1 (Retrainee): \$22.66 per hour for San Diego County; Job Number 2 (Job Creation): \$18.54 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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee)</b>		
Admin Support Band 1	\$26.91 - \$32.00	5
Admin Support Band 2	\$32.01 - \$45.00	5
Estimator Band 1	\$26.91 - \$32.00	2
Estimator Band 2	\$32.01 - \$40.00	8
Team Leads	\$32.00 - \$40.00	10
Technician Band 1	\$26.91 - \$32.00	10
Technician Band 2	\$32.01 - \$35.00	32
<b>Job Number 2 (Job Creation)</b>		
Estimator	\$26.91 - \$32.00	8
Team Leads	\$32.00 - \$45.00	5
Technician Band 1	\$26.91 - \$32.00	10
Technician Band 2	\$32.00 - \$40.00	25
Vet Technicians	\$26.91 - \$32.00	5

## **INTRODUCTION**

Founded in 1993, Newman Replacement Windows, Inc. (Newman) ([www.newmanwindows.com](http://www.newmanwindows.com)), provides residential window and door products. Specifically, the Company installs and retrofits windows and doors for residential consumers. The current customer base includes both residential and commercial customers. As the number one installer of Milgard Windows, for example, the company faces substantial competition from out-of-state companies competing for business in California. Competitors from out of state include Window World (Yuma, Arizona), Lakeside Window & Door (Lake Havasu City, Arizona), Mason Glass (Bullhead City, Arizona), Highland Enterprise (Kingman, Arizona), and JB Window and Glass (Tucson, Arizona). Customers are located in Orange and San Diego Counties.

This will be the Company's first ETP project. The Company's headquarters are in Carlsbad (San Diego County) and training will take place at its three locations in Orange and San Diego County.

### **Veterans Program**

Newman has preference when it comes to hiring and that preference is targeted at Veterans. The Company has assembled a marketing campaign that not only gives preference to but also is aimed at specifically attracting Veterans. Newman also partners with the organization "Hire a Vet", "Troops to Trades" which is a local organization that aids in placing veterans in jobs that are local. Newman would like to give jobs to and train those members of the military that have so generously served this country. Therefore Newman has targeted to hire five Veterans within the next 12 months. However, the Company is not seeking a separate job number for Veterans at this time.

## **PROJECT DETAILS**

The industry has experienced the introduction of new technology that improves energy efficiency, including many changes to residential window and door installations. Some of these changes include electro-chromatic windows that tint or darken on demand, power windows, smart windows, and solar harnessing, which is necessary to reduce grid demands. This new technology provides insulating, cooling and sun-deflective properties that enable indoor cooling, consequently reducing the need for HVAC services.

Additionally, Newman has expanded service offerings in both residential and commercial window/door retrofits and replacements, adding new equipment, which requires training pursuant to Title 24 changes to remain compliant with current government regulations.

Newman has also established partnerships with window replacement programs aimed at increasing efficiency, which also require specific training on equipment, processes, protocols, and reporting requirements. Additionally, given the regular evolution of technology, commercial skills training will be needed for incumbent staff to keep up with regulations and government requirements.

### **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.

Given the current size of the Company (79 employees), Newman has provided ETP staff with the following information to substantiate their request for funding to train 53 Job Creation trainees it plans to hire over the course of the training period. Newman reports that over the last two years, the Company has grown from 30 employees to 88 employees, at a pace of two to three employees per month; and is in the process of adding additional locations to service customers. Therefore, to

continue to meet customer demand, the Company will hire 53 new employees (Job Number 2). 35 of the new hires will be placed at the new facility, while an additional eight new hires will be placed at current locations. Many of the newly hired employees are unskilled or semi-skilled in industry standards, therefore require a significant amount of training in the new technologies specific to the branding, installation IT connected process, retrofitting, repair and application.

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 Delivery Methods. Training will include the following:

**Business Skills:** Training will be offered to all occupations and will include courses such as; Principles of Highly Successful Leaders, Developing SMART Annual Goals, and Skills Builder Applications. See attached menu curriculum for a full list of training topics.

**Commercial Skills:** Training will be offered to Estimators, Technicians and Team Leads. Training will include Glass Materials, and Electrical Hazards Safety. See attached menu curriculum for a full list of training topics.

**Computer Skills:** This training will be offered to all employees. Training will include Service Titan (The Newman window and door tech system, proprietary management software) Skills, Microsoft Office and Google Suites, Using Tablets in the Field, Zoom and Microsoft Teams, Tablet Applications for Field Sales and Technician Scheduling and Installation, and Water Leak Video Inspection Tools.

## Certified Safety Training

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

## Commitment to Training

Newman has an annual training budget of \$165,500. Current training includes computer skills and continuous improvement training. With the assistance of ETP funds, Newman will continue its expansion plans and invest in upskilling its workforce. This will ensure that the Company can continue to meet customer demands, industry standards, all while providing secure jobs for its staff.

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

This project has support from the president of the Company, who will oversee the project with the assistance of the HR Manager. The Company will meet monthly to strategize and ensure it is in compliance with ETP rules and regulations. Three site HR Managers (one for each location) will coordinate and supervise the delivery of training. Training instructors include a combination of subject matter experts within the company as well as outside training vendors. The outside training

vendors will deliver training in commercial skills and safety skills. The Company has also retained an administrative third party to assist with all project administration.

**Impact/Outcome**

ETP funding will assist Newman in its ability to expand on basic skills for new employees and allow the Company to add specific targeted training at incumbent staff necessary for upskilling and upward mobility within the Company. This will allow Newman to meet the demand of new and existing customers while expanding employees' skills and earning potential.

**DEVELOPMENT SERVICES**

Synergy Management Consultants, LLC (Synergy) in Grass Valley will assist with development of this proposal for a flat fee of \$12,000.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

Milgard Windows, JeldWyn and Anlin in Sacramento and Vista, has been retained to provide training in commercial skills (brand specific window installation) for a fee of \$46,525. Other trainers will be identified as they are retained.

**Exhibit B: Curriculum****Class/Lab/E-Learning**

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**

- Glass Materials
- Diagnostics, Measuring, Handling Glass
- Metal Sash
- Door Retrofit Applications
- Safety Glass Procedures
- Sealants
- Residential Glass Code
- Remodel Replacement
- Encapsulated Glass Procedures
- Glass Layout
- Building Design
- Title 24 Standards
- Milgard Windows Applications
- JeldWyn Window Applications
- Anlin Window Applications
- Bird Friendly Glass
- Robotic Window Cleaners
- Smart Windows
- Leak Detection
- Shaded Glass Applications
- Wood Clad Applications

- Tint Application
- Retrofits
- Solar Harnessing Applications
- Connected Home Technology
- Driver Safety
- Lifting Safety
- Ladder Safety
- Work Site Safety
- Equipment Safety
- Attic Insulation Safety
- Electrical Hazards Safety

**Computer Skills**

- Service Titan (The Newman Window and Door Tech System, Proprietary Management Software) Skills
- Microsoft Office and Google Suites. Excel, Word, Power Point, Database systems (Intermediate/ Advanced)
- Using Tablets in the Field
- Zoom and Microsoft Teams
- Tablet Applications for Field Sales and Technician Scheduling and Installation.
- Water Leak Video Inspection Tools

**Safety Skills - OSHA 10 (Certified-OSHA Instructor)**

- OSHA 10



Retrainee-Job Creation  
**Training Proposal for:**  
**Sherwood Mechanical, Inc.**  
**Contract Number: ET24-0261**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** San Diego

**Analyst:** S. Phillips

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative SET	Industry Sector(s):	Construction   Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 160	U.S.: 160	Worldwide: 160
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$315,700

<b>Total ETP Funding</b>
\$294,975

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Commercial Skills, Computer Skills, Business Skills, Continuous Improvement, P/L - Commercial Skills	175	8-200	0	\$1,311	\$30.90
				Weighted Avg: 57			
2	Retrainee SET Priority Rate Job Creation Initiative	Commercial Skills, Computer Skills, Business Skills, Continuous Improvement, P/L - Commercial Skills	50	8-200	0	\$1,311	\$18.54
				Weighted Avg: 57			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1 (Retrainee – SET): \$30.90/ hr.; Job Number 2 (Job Creation): \$18.54/ hr. 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 for Job Number 1.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee)</b>		
Apprentices – Laborers/ Plumbers/ Pipe Fitters	\$28.40-\$30.90	20
CAD Designer	\$28.48-\$35.04	10
Field Staff - Laborers/ Plumbers/ Pipe Fitters/ Truck Drivers	\$30.95-\$34.86	115
Project Management Staff	\$31.15-\$35.03	20
<b>Job Number 2 (Job Creation)</b>		
Field Staff - Laborers/ Plumbers/ Pipe Fitters/ Truck Drivers	\$18.54-\$20.00	10
	\$20.01-\$25.00	5
	\$25.01-\$33.28	5
Finance/Administrative Staff	\$19.58-\$20.00	3
	\$20.01-\$25.00	1
	\$25.01-\$35.49	1

Project Management Staff	\$27.12-\$33.70	5
Support Team	\$18.54-\$20.00	4
	\$20.01-\$25.00	3
	\$25.01-\$33.73	3
Warehouse Staff	\$18.54-\$20.00	3
	\$20.01-\$26.97	2

## **INTRODUCTION**

Founded in 2003, and headquartered in San Diego, Sherwood Mechanical, Inc. (Sherwood) ([www.sherwoodmechanical.com](http://www.sherwoodmechanical.com)), is a commercial plumbing contractor serving Southern California. Services include an extensive range of commercial plumbing services from pre-construction (conceptual drawings to plans and specs), through construction providing safe water supply as well as proper disposal of fluid waste from premises. The Company also provides post construction services such as maintenance, service repair and warranty work.

Sherwood's customer base includes companies and organizations operating assisted living centers, multifamily properties, educational institutions, hotels, medical facilities, military facilities, office buildings, prisons, restaurants and retail spaces. Sherwood has completed projects for companies and organizations in the region such as Cannon Construction South, Inc., Balfour Beatty Construction, CW Driver, Hilton San Diego Airport, and Pechanga Casino & Hotel.

This will be the Company's first ETP project. Training will take place at its location in San Diego. The proposed training will not duplicate or copy DAS pre-approved apprenticeship training.

### **Veterans Program**

Sherwood does not currently have a formal plan to recruit Veterans. However, the Company encourages Veterans to apply for open positions. Sherwood is not seeking a separate job number at this time.

## **PROJECT DETAILS**

The Company is currently experiencing rapid growth due to increased customer demand. As a result, there is a need to rapidly hire employees as well as train them in current industry standards and technological advancements. The proposed training will enable Sherwood to meet deadlines, improve customer satisfaction and upskill its workforce.

In addition, Commercial plumbing technology is changing rapidly. Therefore, employees need to learn how to read conceptual drawings, plans, and project specifications in order to respond to customer demands and complete jobs in an efficient manner. In addition, the Company must learn new construction techniques to enable them to remain competitive in the construction industry while building the most cost-effective projects possible.

Over the years the industry has also adopted LEED (Leadership In Energy and Environmental Design) technologies. Sherwood is a leader in implementing LEED on projects. To implement this approach employees must learn techniques and skills necessary to provide construction services that are sustainable, water efficient and energy efficient; have improved indoor environment quality, and exhibit innovation in design. To that end, to meet these requirements, Sherwood employees will receive training on these technologies which will help employees find ways to reduce costs while making sure projects are completed, and on budget.

## Retrainee - Job Creation

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

The Company is experiencing rapid growth due to customer demand and will therefore 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.

## Training Plan

Training will be provided using Class/Lab/E-Learning and Productive Lab delivery methods in the following:

**Business Skills:** This training will be offered to all occupations. Training will include Communication Skills, Effective Customer Service, Estimating Skills, Innovation Tools & Processes, Logistics and Transportation, Negotiation Skills, Persuasion Strategies, Planning & Execution, Presentation Skills, Risk Management, Schedule and Team Building.

**Commercial Skills:** This training will be offered to all occupations. Training will include Electrical Hazards Safety, Excavator, Field Tools/Gauges, Finish Work, Fusion Technology, Identifying Waste Products, Infrastructure Inspection, Ladder Safety Maintenance Tune up Process, Material Equipment, Mechanical Cooling, Metering Devices, Pre Task Planning and Product Specifications.

**Computer Skills:** This training will be offered to Technicians, Field Staff, Apprentices, CAD Designers, and Frontline Managers/Supervisors. Training will include Advanced Computer Applications, AutoCAD, Document Control, Electronic Bids, Electronic Forms, Microsoft Office Suite (Intermediate/Advanced), Scheduling Software, Software Installation, Tablet Applications, Windows Management, and Zoom/ Microsoft Teams.

**Continuous Improvement:** This training will be offered to all occupations. Training will include Building Teams, Material Specifications, Product Testing, Production Scheduling, Solving Construction Problems, and Standard Operating Procedures.

## 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.

Sherwood uses job-site specific equipment when completing jobs for clients. As such, hands-on instruction is required to ensure trainees are competent to use the equipment while in the field at a job-site. As such, the Company is requesting up to 20 hours of productive lab per trainee over a two year period. This trainer-to-trainee ratio will be 1:1 to ensure attention to detail while training while on the job. Occupations to receive productive lab training include Apprentices, Field Staff, Warehouse Staff and the Support Team.

## Commitment to Training

Sherwood has an annual training budget of \$330,400 per year at its San Diego location. Training includes basic commercial skills, a new-hire orientation, first-aid, 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

The training coordinator will manage the training program with assistance from assistant Training Coordinators located at each job site where the Company has projects. There will be 20 Supervisors who are subject matter experts that will provide the training for the project. The Company has also retained an administrative subcontractor who will assist with project administration.

### **Impact/Outcome**

With the assistance of ETP Funds, Sherwood will be able to offer a larger variety of training topics and resources to employees that will increase the competency levels of staff, allowing for upward mobility within the Company and industry. Employees will be trained in company-specific skills to ensure high standards of customer service and efficiency in job completion. This will support the Company's efforts in expanding its offerings and support continued company growth.

### **Electronic Recordkeeping/LMS**

Sherwood currently uses a Learning Management System, Sherwood Portal. Data will be entered in the field via a tablet and then uploaded to the main system back at headquarters. A coordinator, the Safety Manager, will then review the data for quality control, before sending the data to an administrative subcontractor. The administrative subcontractor will then upload training hours into ETP's online system.

Records are accessible for five years. A sample has been provided, reviewed and approved by ETP.

### **DEVELOPMENT SERVICES**

The Company retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of \$14,000.

### **ADMINISTRATIVE SERVICES**

The Company retained National Training Company, Inc. 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Active Listening Skills
- Bids and Proposals
- Building Strong Relationships
- Communication Skills
- Customer Needs Assessment
- Developing SMART Annual Goals
- Effective Customer Service
- Estimating Skills
- External Environment Analysis
- Innovation Tools and Processes
- Logistics and Transportation
- Negotiation Skills
- Persuasion Strategies
- Planning and Execution
- Presentation Skills
- Risk Management
- Schedule Development
- Team Building
- Understanding Expectations

**Commercial Skills**

- Advanced Core Drilling
- Covid Safety Factors
- Custom Solutions
- Distribution Systems
- Drafting
- Driver Safety
- Electrical Hazards Safety
- Equipment Safety
- Excavator
- Field Tools/Gauges
- Finish Work
- Fusion Technology
- Identifying Waste Products
- Infrastructure Inspection
- Ladder Safety
- Maintenance Tune Up Procedures
- Material Equipment
- Mechanical Cooling
- Metering Devices
- Pre Task Planning
- Product Specifications
- Quality Control
- Reading Technical Specifications

- Safety Data Sheets
- Standard Operating Procedures
- System Controls/Smart System
- System Design
- Test Pipe Systems
- Trench Shoring Systems
- Underground Systems
- Waste Remediation Planning
- Water Quality
- Worksite Safety

### **Computer Skills**

- Advanced Computer Applications
- AutoCAD
- Document Control
- Electronic Bids
- Electronic Forms
- Microsoft Office (Intermediate/Advanced)
- Scheduling Software
- Software Installation
- Tablet Applications
- Windows Management
- Zoom and Microsoft Teams

### **Continuous Improvement Skills**

- Building Teams
- Material Specifications
- Product Testing
- Production Scheduling
- Solving Construction Problems
- Standard Operating Procedures

### **Productive Lab (Trainer-to-Trainee Ratio 1:1)**

Trainees may receive any of the following:

### **Commercial Skills**

- Advanced Core Drilling
- Driver Safety
- Excavator
- Field Tools/Gauges
- Infrastructure Inspection
- Material Equipment
- Trench Shoring Systems
- Underground Systems



Retrainee-Job Creation

**Training Proposal for:**

**Aegeus Inspection Solutions Services, Inc.**

**Contract Number: ET24-0259**

**Panel Meeting of:** October 27, 2023

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

**Analyst:** S. Wang

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee HUA Job Creation Initiative	Industry Sector(s):	Services Professional Scientific Technology Aerospace Related  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kern, Ventura, Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 135	U.S.: 500	Worldwide: 20,000
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$300,000

<b>Total ETP Funding</b>
\$294,975

# **TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, OSHA 10, OSHA 30, PL- Comm. Skills	41	8-200	0	\$1,725	\$22.66
				Weighted Avg: 75			
2	Retrainee Priority Rate HUA	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, OSHA 10, OSHA 30, PL- Comm. Skills	30	8-200	0	\$1,725	\$18.00
				Weighted Avg: 75			
3	Retrainee Priority Rate Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, OSHA 10, OSHA 30, PL- Comm. Skills	75	8-200	0	\$2,300	\$18.54
				Weighted Avg: 100			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1 (Retrainee): \$22.66 per hour for Los Angeles and Ventura; Job Number 2 (Retrainee/HUA): \$17.00 per hour for Kern County; Job Number 3 (Job Creation): \$18.78 per hour for Los Angeles County and \$18.54 per hour for Ventura 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

Up to \$1.66 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Up to \$0.78 per hour may be used to meet the Post-Retention Wage for Job Number 3.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee)</b>		
Field Supervisor	\$30.00 - \$50.00	3
Inspector	\$30.00 - \$55.00	10
Technician	\$21.00 - \$25.00	12
	\$25.01 - \$55.00	16

<b>Job Number 2 (Retrainee/HUA)</b>		
Technician	\$18.00 - \$20.00	30
<b>Job Number 3 (Job Creation)</b>		
Inspector	\$30.00 - \$55.00	2
Technician	\$18.00 - \$20.00	58
	\$20.01 - \$25.00	10
	\$25.01 - \$55.00	5

## **INTRODUCTION**

Established in 2023 and headquartered in Charlotte, North Carolina, Aegeus Inspection Solutions Services, Inc. (AIS) (<https://aegeusinspections.com/>) delivers conventional and advanced non-destructive testing, inspection, engineering, and staff augmentation solutions for the renewable energy utilities, defense, and aerospace sectors. The Company implements tailored inspection programs and solutions to minimize costs and increase performance to securing regulatory compliance. Training will be delivered at its locations in Ventura, Bakersfield, and Long Beach.

AIS original application was submitted under the company name Applus RTD USA Services, Inc. (Applus) which was founded in 2015. In the middle of 2023, an investment group called Ten Oak Group bought Applus and changed Applus's name to AIS. All employees that were under Applus are now employed under AIS. This will be AIS's first ETP Contract. Some of its customer base includes facility and infrastructure owners and operators, construction contractors, government institutions, and utility companies.

### **Veterans Program**

Although AIS does not have a separate Veterans' Job Number, the Company uses Circa which is a platform that helps veterans find job opportunities. AIS posts job vacancies on this platform to help create a diverse workplace.

## **PROJECT DETAILS**

ETP-funded training will help support AIS's goal of meeting the renewable energy and aerospace industry's market shift. Over the past few years, customers want a leaner and more efficient method for collecting higher quality data resulting in additional focus within the Automated Non-Destructive Testing (ANDT). This realigned focus would require additional training for staff within the Conventional Non-Destructive Testing, ANDT, and Mechanical Integrity based inspection method. Some of these methods include Automated Ultrasonic Testing, Leaking Testing, Liquid Penetrant (PT), and Radiography (RT).

### **Retrainee - Job Creation**

In this proposal, the Company will hire 75 new employees (Job Number 3) within the term of the Contract. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. 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, AIS recently opened a new facility in Long Beach to help expand its product line and services to keep up with customer demand. With the pickup in the oil and gas

industry, this has led to a resurgence of the market, which created a higher demand for AIS to update and deliver its solutions to serve its customers.

## Training Plan

Training will be conducted via Class/Lab, E-Learning, and Productive Lab (PL) delivery methods in the following:

**Business Skills:** Training will be offered to all occupations on courses that include Customer Service Skills to ensure staff knows how to deliver the products to the customers.

**Commercial Skills:** Training will be offered to all occupations on courses that include Electromagnetic Testing, Leak Testing, Radiological Testing, and Ultrasonic Testing to ensure staff is well trained on the updated methods.

**Computer Skills:** Training will be offered to all occupations on courses that include Business Operations Software and Advanced/Intermediate Microsoft Word, Excel, and PowerPoint to ensure staff has the knowledge on how to use the software.

**Continuous Improvement:** Training will be offered to all occupations on courses that include Process Improvement, Leadership, Six Sigma, and Project Management to ensure efficiency to the workflow.

## Productive Laboratory (PL– Commercial Skills)

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training. The proposed PL training will offer cross-training opportunities on the methods used throughout the diagnostics and maintenance process. Approximately 100 Technicians who directly interface with the diagnosis and maintenance process will attend the PL- Commercial Skills' training.

PL training will ensure that Technicians acquire the critical skills needed to perform their jobs at a quality standard acceptable by the regulatory bodies. It is also required by industry standards to be certified in the methods. PL training at AIS is an interactive training directly supervised by qualified trainers who are certified Technicians with a Level 2 or Level 3 in the methods being taught. The PL trainer-to-trainee ratio will be 1:1. Technicians are certified as competent only after completing all PL assignments and passing a skills-competency test. Upon certification of their competency, the trainee can independently work on the delivery of the methods. AIS will deliver up to 40 hours of PL per trainee.

## Certified Safety Training

1. OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
2. Hazardous Materials (HAZMAT). This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Field Supervisor, Inspector, and Technician will receive up to 100 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 is Aerial Work Platform.

### **High Unemployment Area**

Some trainees (Job Number 2) work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's location in Kern County 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 pre-retention wages. The Company is requesting this wage modification of \$18.00, even though ETP's HUA guidelines allow for \$17.00 per hour (Retrainee/HUA) to be used as the ETP post-retention wage for this county) for Job Number 2. Approximately, 30 Technicians will need the wage modification.

### **Commitment to Training**

AIS reports the annual statewide training expenditure in California is \$500,000. The proposed ETP curriculum will build on, but not overlap, basic instruction and orientation training already provided by 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**

AIS' Human Resources Manager (dedicated administrator) will oversee the project with a Senior Technical Manager, a Technical Administrative Assistant, and a HR Coordinator to assist in the scheduling of training, collecting training records, and other internal administrative duties. ETP-funded training will be delivered by a combination of internal experts and training vendors as needed.

### **Impact/Outcome**

Upon completion of ETP-funded training, trainees will received certification in Magnetic Particles, PT, UT Shearwave, RT, Visual Inspection (VT), and other various conventional methods.

### **DEVELOPMENT SERVICES**

N/A

### **ADMINISTRATIVE SERVICES**

N/A

### **TRAINING VENDORS**

To Be Determined

## **Exhibit B: Curriculum**

### **Class/Lab/E-Learning**

Trainees may receive any of the following:

#### **Business Skills**

- Customer Service Skills

#### **Commercial Skills**

- Acoustic Emission
- Electromagnetic Testing
- Ground Penetrating Radar
- Guided Wave
- Laser Methods
- Leak Testing
- Magnetic Flux Leakage
- Magnetic Particle Testing
- Penetrant Testing
- Radiological Testing
- Thermal/Infrared Testing
- Ultrasonic Testing
- Vibration Analysis
- Visual Testing
- 3D Scanning

#### **Computer Skills**

- Business Operations Software
- Microsoft Word, Excel, PowerPoint (Advanced/Intermediate)

#### **Continuous Improvement Skills**

- Process Improvement
- Leadership
- Six Sigma
- Project Management

#### **Hazardous Materials Skills**

- Hazardous Materials Handling
- Hazardous Waste
- Hazardous Monitoring/Clean-Up

#### **Safety Skills - OSHA 10 (Certified-OSHA Instructor)**

- OSHA 10

#### **Safety Skills - OSHA 30 (Certified-OSHA Instructor)**

- OSHA 30

**Productive Lab (Trainer-to-Trainee Ratio 1:1)**

Trainees may receive any of the following:

**Commercial Skills**

- Set Up and Job Preparation
- Equipment Operation
- Non-Destructive Testing



Retrainee-Job Creation  
**Training Proposal for:**  
**Lyell Immunopharma, Inc.**  
**Contract Number: ET24-0256**

**Panel Meeting of:** October 27, 2023

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

**Analyst:** S. Wang

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Services Professional, Scientific Technology Biotechnology/Life Sciences  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 115	U.S.: 295	Worldwide: 295
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$350,000

<b>Total ETP Funding</b>
\$276,000

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comm. Skills, Cont. Improv.	110	8–200	0	\$1,725	\$26.00
				Weighted Avg: 75			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Comm. Skills, Cont. Improv.	50	8–200	0	\$1,725	\$26.00
				Weighted Avg: 75			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$24.72 per hour for San Mateo County.

Job Number 2 (Job Creation): \$20.60 per hour for San Mateo County.

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

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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee)</b>		
Business Operation Staff	\$26.00 - \$130.00	15
Professional Staff	\$26.00 - \$116.00	35
Scientists, Engineers	\$28.00 - \$120.00	60
<b>Job Number 2 (Job Creation)</b>		
Professional Staff	\$26.00 - \$116.00	20
Scientists, Engineers	\$28.00 - \$120.00	30

**INTRODUCTION**

Founded in 2018 and headquartered in South San Francisco, Lyell Immunopharma, Inc. (Lyell) (<https://lyell.com/>) is a clinical-stage therapy company that manufactures products and T-cell reprogramming technologies designed to address major barriers to successful adoptive cell therapy for solid tumors. Some of the Company's product pipeline includes: chimeric antigen receptor, tumor-infiltrating lymphocytes and T-cell receptor therapies to help generate T-cells. These therapies use the patient's own cells as the starting point to generate highly tumor-reactive, longer-lasting functional T-cells with enhanced ability to defeat solid tumors. ETP training will be delivered at its headquarter location in South San Francisco.

Lyell's customer-base includes medical centers, researchers, and hospitals throughout the world. This will be Lyell's first ETP Contract.

## Veterans Program

Although Lyell does not plan to include a separate Veteran's Job Number, the Company actively recruits and encourages veterans to apply for employment opportunities.

## PROJECT DETAILS

Training will focus on the Company's strategic plan to help scale business, while being cross-functional and commercially-oriented. Lyell's business is progressing into the later-stage drug development; thus, the skill requirement for staff shifts from research science to clinical development. Clinical development is the shift into in-human clinical trials, which requires an in-depth understanding of medical and clinical operations and requirements. Some of the clinical development training includes clinical trial design, clinical trial recruitment and execution, clinical data management, analysis, and reporting, and more routine interactions with regulatory agencies who govern the work of biopharma organizations. ETP training is needed to help the Company advance its product pipeline towards commercialization.

### Retrainee - Job Creation

In this proposal, the Company will 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 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, Lyell has shifted from a primarily research and development company to soon having a number of marketed products and solutions to deliver to its customers. Due to this shift, Lyell will need more staff to be able to meet customer demands in the next two years and beyond.

### Training Plan

Training will be conducted via Class/Lab and E-Learning delivery methods in the following:

**Business Skills:** Training will be offered to all occupations and will include course topics like Business Acumen, Effective Communication Skills, Marketing 101, and Presentation Skills to ensure staff will have the latest knowledge of business processes

**Commercial Skills:** Training will be offered to all occupations and will include course topics like Clinical Data Science, Clinical Operations, Drug Discovery & Development 101, and Preparing for Commercialization to ensure staff knows the procedures to deliver the commercialized products.

**Continuous Improvement:** Training will be offered to all occupations and will include course topics like Good Pharmaceutical Practices, Risk Management, and Root Cause Analysis & Problem Solving to ensure staff knows how to troubleshoot issues.

### Commitment to Training

The Company's annual training budget in California is \$50,000. This training includes rudimentary job skills, new-hire orientation, and Business Skills. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Lyell's Senior Director, People Partner (dedicated administrator) will oversee the project with two People Coordinators to assist in the scheduling of training, collecting training records, and other internal administrative duties. Training will be delivered by a combination of in-house experts and vendors.

**Impact/Outcome**

As a result of ETP funds, Lyell's training plan includes Business Acumen which staff will receive certification upon completion of training.

**Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

Hands On, LLC in San Francisco has been retained to provide Business Skills, Commercial Skills, and Continuous Improvement training for a fee of \$100,000. Other trainers will be identified as they are retained.

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Budget & Resource Management
- Business Acumen
- Change Management
- Decision Making
- Delegation & Prioritization
- Effective Communication Skills
- Effective Meetings
- Finance for Non-Finance Managers
- Healthcare Economics
- Ideation & Innovation
- Increasing Resiliency
- Leading Change
- Leading High Performing Teams
- Leading Large Teams & Leading Through Others
- Managing Others
- Marketing 101
- Marketing 201
- Negotiation Skills
- Presentation Skills
- Project Management
- Strategic Planning
- Team Optimization
- Values-Based Healthcare & Market Access

**COMMERCIAL SKILLS**

- Clinical Data Science
- Clinical Development
- Clinical Operations
- Drug Discovery & Development 101
- Drug Discovery & Development 201
- Preparing for Commercialization
- Preparing for Investigational New Drug Applications
- Preparing for Phase 3 Clinical Trials

**CONTINUOUS IMPROVEMENT**

- Good Pharmaceutical Practices
- Quality Management
- Risk Management
- Root Cause Analysis & Problem Solving
- Business Process & Continuous Improvement



**Training Proposal for:**  
**Western Digital Technologies, Inc.**

**Contract Number: ET24-0250**

**Panel Meeting of:** October 27, 2023

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

**Analyst:** N. Shafqat

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Manufacturing (E)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, San Mateo, Orange, Santa Clara, Placer	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 5,642	U.S.: 7,664	Worldwide: 58,935
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	1%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$1,180,000

<b>Total ETP Funding</b>
\$303,600

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Imp. Skills, Manufacturing Skills	600	8–200	0–60	\$506	\$22.66
				Weighted Avg: 22			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** \$24.72 per hour for Alameda, San Mateo, and Santa Clara counties; \$22.66 per hour for Placer and Orange counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Customer Support Staff	\$29.81 - \$66.00	10
Engineering/Information Technology Staff	\$23.74 - \$25.00	25
	\$25.01 - \$90.00	290
Managers	\$40.85 - \$100.00	60
Manufacturing/Production/Technician Staff	\$20.16 - \$25.00	20
	\$25.01 - \$68.00	180
Marketing/Sales Staff	\$29.61 - \$80.00	15
Supply Chain/Logistics Staff	\$20.50 - \$25.00	3
	\$25.01 - \$63.00	17
Support Staff	\$25.24 - \$76.00	80

**INTRODUCTION**

Founded in 1970 and headquartered in San Jose, Western Digital Technologies, Inc. (WDT) ([www.westerndigital.com](http://www.westerndigital.com)) designs, manufactures, and sells high-performance hard disks, solid-state drives, and other consumer electronics. WDT is one of the largest traditional hard drive manufacturer in the world. The Company's customers include major personal computer manufacturers, technology companies, retailers, distributors, and direct customers worldwide. WDT has multiple locations globally that include Europe, Middle East, Africa, UK, China, India, Japan, South Korea, and Taiwan. This project will be administered in its Irvine location. ETP training will be delivered at its seven California facilities located in Irvine, Milpitas, Newark, San Jose (Great Oaks and Rue Ferrari), Redwood City, and Roseville.

This will be WDT's sixth ETP Contract, its second in the last five years. In the last project, the training focused on multi-platter drives that meet high-storage needs used in "server farms" (a group of networked servers housed in one location) to house and manage massive quantities of data. In this proposal, training aims to leverage the Company's innovation, technology, and execution capabilities to be an industry-leading broad-based developer, manufacturer, and provider of storage devices and solutions to support infrastructure that enables the proliferation of data.

## **PROJECT DETAILS**

ETP funding is need to support the Company's need for continued innovation to remain competitive in the industry and to implement new processes and systems. WDT relies on upskilling and reskilling its employees on technical and leadership capabilities to achieve its goals while also empowering its workforce to stay competitive in the marketplace. WDT strives to successfully execute its strategy through the following foundational elements in order to create long-term value for its customers, partners, investors, and employees:

- **Innovation and Cost Leadership:** WDT continues to innovate and develop advanced technologies across platforms for both Flash Drive and Hard Drive Disk Drive (HDD) to deliver timely new products and solutions to meet growing demands for scale, performance and cost efficiency in the market.
- **Broad Product Portfolio:** WDT leverages its capabilities in firmware, software and systems in both Flash Drive and HDD deliver compelling and differentiated integrated storage solutions to customers that offer the best combinations of performance, cost, power consumption, form factor, quality and reliability, while also creating new use cases for its solutions in emerging markets.
- **Operational Excellence:** WDT is focused on delivering the best value for its customers in cloud, client and consumer end markets through a focus on appropriately scaling its operations across both Flash Drive and HDD technologies to efficiently support business growth.

## **Veterans**

Although WDT does not have a formal training plan for Veterans, the Company values the skills, experience, and knowledge of the Veteran community and currently has 71 self-identified Veterans employed in California.

WDT also serves the underserved communities through organizations such as B.org, the Society of Hispanic Engineers, and the National Society of Black Engineers. The Company also gains insight into these populations through our strategic partners such as Disability: IN and Out and Equal and non-profit grantees who include Braven, MESA, and Hire Heroes. Additionally, the Company engages with underserved communities in a variety of ways such as directly through diversity-focused conferences such as the Grace Hopper Celebration for Women and Non-Binary Technologists, diversity-focused resume databases and job boards, and with university-based chapters of diversity-focused organizations.

## **Training Plan**

The following training will be conducted via Class/Lab, E-Learning, and Computer-Based Training (CBT) delivery methods:

**Business Skills:** This training will be offered to all occupations on courses like Business Process Skills, Finance/Accounting Skills, and Communication Fundamentals to manage both internal and external customer relationships and to speak to the WDT products with acumen. These skills will enable staff to manage higher workloads and a variety of customer accounts, while improving operational efficiency.

**Computer Skills:** This training will be offered to Engineering/Information Technology Staff on software such as Cybersecurity/Information Security Skills, Software/Hardware Skills, Master SQL for Data Science, and Engineering System Skills to design higher capacity disks with increased security encryption.

**Continuous Improvement:** This training will be offered to all occupations on courses that include Change Management, Leadership/Coaching Skills, and Organizational Management/Process Improvement. Training will be based on individual needs and job function to develop critical thinking skills and collaborative problem solving skills between the functional teams responsible for designing, testing, and integrating the various features of new products while also reducing production errors, improving quality, and shortening delivery times.

**Manufacturing Skills:** This training will be offered to select Managers, Manufacturing/Production/Technician Staff, and Engineering/Information Technology Staff on Advance Safety Skills, Equipment Operations Skills, and Manufacturing Process Skills.

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

CBT will be provided to supplement Class/Lab and E-Learning, which is a more convenient means of delivering basic training. Trainees will receive between 0–60 hours of CBT.

### **Commitment to Training**

WDT reports that it annually spends \$1,000,000 on training at its California facilities. This training includes newly hired orientation, OSHA-mandated training, sexual harassment and violence in the workplace prevention, first aid and CPR, and basic computer skills. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

WDT's Director of People Development (dedicated administrator) will manage the project by overseeing the scheduling, delivery, and documentation of training at each of the Company's locations. Training will be delivered by approximately 50 in-house subject-matter experts who are experienced staff within WDT and by external training vendors on a case-by-case basis if needed. It has also retained a third-party subcontractor- Training Funding Partners (TFP) to assist with ETP administration and staff.

### **Electronic Recordkeeping/LMS**

The Company has requested to use Cornerstone on Demand as an Electronic Record Keeping system. Although the system is new to WDT, the Company has experience with LMS for over 11 years. An LMS walkthrough has been conducted and LMS has been approved for use by ETP.

### **Impact/Outcome**

ETP funded training will help WDT reach the goals that include the development of new products and technologies and the skill sets necessary to successfully manage company growth. The upskilling of the workforce will also provide long term career opportunities for employees.

Additionally, the training will assist WDT to remain competitive in fast improving manufacturing industry.

### **PRIOR PROJECTS**

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

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
18CS-0263	Milpitas	6/4/18 – 6/3/20	\$157,300	\$157,300 (100%)

### **DEVELOPMENT SERVICES**

The Company retained TFP in Fountain Valley to assist with development of this proposal for a flat fee of \$19,500.

### **ADMINISTRATIVE SERVICES**

WDT 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Process Skills/Business Acumen
- Communication/Conflict Resolution Skills
- Consumer Product Skills
- Finance/Accounting Skills
- New Product Solutions
- Purchasing Skills
- Train-the-Trainer

**COMPUTER SKILLS**

- Cybersecurity/Information Security Skills
- Data Analytics/Database Systems
- Engineering System Skills
- Flash Drive Skills
- Hard Disk Drive Skills
- Intermediate/Advanced Microsoft Office
- Proprietary System Skills
- Software/Hardware Skills

**CONTINUOUS IMPROVEMENT**

- Change Management
- Engineering Process/Design Skills
- ISO Certification Skills
- Leadership/Coaching Skills
- Organizational Management/Process Improvement

**MANUFACTURING SKILLS**

- Advanced Safety Skills
- Equipment Operations Skills
- Manufacturing Process Skills

**Computer-Based Training****BUSINESS SKILLS**

- Accounting in 60 Minutes - A Brief Introduction (1.68 hours)
- American English Pronunciation (3 hours)
- Ask Better Questions - Build Better Relationships (2.25 hours)
- Building Your English Brain (3 hours)
- Business Presentation Skills for Nonnative English Speakers (2 hours)
- Communication Fundamentals: How To Communicate Better (3.75 hours)
- Conflict Management with Emotional Intelligence (3.75 hours)
- Critical Thinking Strategies For Better Decisions (1 hours)
- Effective Communication in the Workplace (3 hours)

- Email Etiquette: Write More Effective Emails At Work (1.25 hours)
- Emotional Intelligence: Master Anxiety, Fear, & Emotions (6.8 hours)
  - Section 1: Introduction (29min)
  - Section 2: Understanding Emotions (1hr 5min)
  - Section 3: Emotional Awareness (1hr 30min)
  - Section 4: Self-Control Techniques (1hr 24min)
  - Section 5: Combatting Stressors (43min)
  - Section 6: Neuro Linguistic programming Progresses (15min)
  - Section 7: Self-Empowerment Techniques (1hr 16min)
  - Section 8: Next Steps (7min)
- Essential Business English (3 hours)
- How to Manage Difficult Conversations: Beginner's Guide (1 hours)
- Kubernetes for the Absolute Beginners - Hands-on (5.8 hours)
  - Section 1: Introduction (11min)
  - Section 2: Kubernetes Overview (25min)
  - Section 3: Kubernetes Concepts (14min)
  - Section 4: YAML Introduction (12min)
  - Section 5: Kubernetes Concepts – Pods, ReplicaSets, Deployments (2hr 13min)
  - Section 6: Networking in Kubernetes (6min)
  - Section 7: Services (36min)
  - Section 8: Microservices Architecture (47min)
  - Section 9: Kubernetes on Cloud (29min)
  - Section 10: Conclusion (1min)
- Leadership: How to Influence, Inspire and Impact as a Leader (1.5 hours)
- Leadership: Practical Leadership Skills (2.8 hours)
- Write Better Emails: Tactics for Smarter Team Communication (1.65 hours)
- Successful Negotiation: Master Your Negotiating Skills (1.75 hours)

### **COMPUTER SKILLS**

- Beginning C++ Programming - From Beginner to Beyond (45 hours)
  - Section 1: Introduction (20min)
  - Section 2: Installation and Setup (2hr 7min)
  - Section 3: Curriculum Overview (10min)
  - Section 4: Getting Started (1hr 10min)
  - Section 5: Structure of a C++ Program (43min)
  - Section 6: Variables and Constants (1hr 13min)
  - Section 7: Arrays and Vectors (56min)
  - Section 8: Statement and Operators (1hr 48min)
  - Section 9: Controlling Program Flow (3hr 28min)
  - Section 10: Characters and Strings (1hr 18min)
  - Section 11: Functions (2hr 51min)
  - Section 12: Pointers and References (2hr 38min)
  - Section 13: OOP – Classes and Objects (4hr 11min)
  - Section 14: Operator Overloading (2hr 10min)
  - Section 15: Inheritance (2hr 24min)
  - Section 16: Polymorphism (2hr 6min)
  - Section 17: Smart Pointers (1hr 14min)
  - Section 18: Exception Handling (1hr 11min)
  - Section 19: I/O and Streams (3hr 2min)

- Section 20: The Standard Template Library (STL) (5hr 18min)
  - Section 21: Lambda Expressions (2hr 2min)
  - Section 22: Bonus Section – Using Visual Studio Code (1hr 36min)
  - Section 23: Bonus Section – Enumerations (53min)
  - Section 24: ARCHIVED – OLD INSTALLATION VIDEOS (1hr 1min)
  - Section 25: Extra Information – Source code, and other stuff (1min)
  - Section 26: Bonus Section – including Slides (3min)
- Blockchain and Bitcoin Fundamentals (3 hours)
- Blockchain in Supply Chain Management (2.3 hours)
- C# Intermediate: Classes, Interfaces and OOP (6 hours)
  - Section 1: About this Course (6min)
  - Section 2: Classes (1hr 58min)
  - Section 3: Association between Classes (30min)
  - Section 4: Inheritance – Second Pillar of OOP (1hr 3min)
  - Section 5: Polymorphism: Third Pillar of OOP (38min)
  - Section 6: Interfaces (1hr 9min)
  - Section 7: What's Next? (3min)
  - Section 8: Bonus: Students' Code Reviews (32min)
- Certified Lean Six Sigma Yellow Belt Training (6 hours)
  - Section 1: Six Sigma Fundamentals (2hr 20min)
  - Section 2: Define Phase (56min)
  - Section 3: Measure Phase (1hr 3min)
  - Section 4: Analyze (1hr 22min)
  - Section 5: Improve and Control (20min)
  - Section 6: End of Course (10min)
- Certified Lean Specialist | Lean Management (Accredited) (3 hours)
- Complete Introduction to Microsoft Power BI [2023 Edition] (7 hours)
  - Section 1: Introduction (4min)
  - Section 2: Sign Up for Power BI (19min)
  - Section 3: The Power BI Desktop (11min)
  - Section 4: Creating Reports in Power BI Desktop (2hr)
  - Section 5: Graphs and Visualizations (1hr 19min)
  - Section 6: Interactive Dashboards (1hr 1min)
  - Section 7: DAX Formulas (39min)
  - Section 8: DAX Measures (29min)
  - Section 9: Relationships (14min)
  - Section 10: Power BI Query Editor (28min)
  - Section 11: Analyze Data with Excel (11min)
  - Section 12: Corona Virus Case Study (13min)
  - Section 13: Conclusion (2min)
- Design Thinking in 3 Steps (1.75 hours)
- Digital Transformation and Industry 4.0 (3 hours)
- Docker for the Absolute Beginner - Hands On - DevOps (4 hours)
- Git Essentials: Learn Git with Bitbucket and Sourcetree (2.5 hours)
- Git Going Fast: One Hour Git Crash Course (1.5 hours)
- How to tell a story with data (1.75 hours)
- JavaScript: Understanding the Weird Parts (12 hours)
  - Section 1: Introduction (21min)
  - Section 2: Git Installation (9min)
  - Section 3: Git Quick Start (16min)

- Section 4: GitHub Updates (11min)
- Section 5: Text Editor Installation (18min)
- Section 6: Basic Git Commands (1hr 42min)
- Section 7: Visual Merge/Diff Tool Installation (18min)
- Section 8: Comparisons (22min)
- Section 9: Branching and Merging (35min)
- Section 10: Rebasing (24min)
- Section 11: Stashing (27min)
- Section 12: Tagging (22min)
- Section 13: Bonus: Office Hour Sessions (42min)
- JMP Training for Statistics & Data Visualization (3.3 hours)
- Lean Management Certification | Lean Expert | Accredited (3.6 hours)
- Learn GIT In depth with BitBucket- Practical work flows (6.3 hours)
  - Section 1: Introduction to GIT – Course FAQ's
  - Section 2: Install the GIT & Setup Remote BitBucket repository to clone the code (26min)
  - Section 3: Understand GIT State mechanism – Working Directory, Staging, Commit (36min)
  - Section 4: Git Branching Strategies and workflows to work on GIT branches (20min)
  - Section 5: Reverting the Commits in Hard, Mixed & Soft Reset GIT modes (26min)
  - Section 6: Creating Pull requests in the Bitbucket and approach to review (20min)
  - Section 7: Merging the branches and solving resolve conflicts in multiple ways (52min)
  - Section 8: Importance of GIT rebase and squash. Real time usage of applying them (36min)
  - Section 9: Advanced GIT work flows – Editing last commits. Git Cherry Pick (42min)
  - Section 10: How to stash the changes and revert the code in Git public repository (23min)
  - Section 11: Understand bitbucket build pipelines and autotrigger them on (35min)
  - Section 12: Miscellaneous – GIT pull vs fetch & Clone vs Fork & Git Tagging (22min)
  - Section 13: Introduction to Source tree to operate GIT commands through Git (15min)
  - Section 14: Jira & Bitbucket Integration and its advantages – real time example (16min)
- Learn Multithreading in C++ (3.4 hours)
- Machine Learning for Absolute Beginners - Level 1 (2 hours)
- Manage and Visualize Projects in Smartsheet (2 hours)
- Marketing Communication | Integrated Marketing Communication (1 hours)
- Master Microsoft Excel Macros and Excel VBA (5.4 hours)
- Master SQL For Data Science (9.4 hours)
  - Section 0: Course Overview (5min)
  - Section 1: Database Basics (1hr 7min)
  - Section 2: SQL Query Basics (1hr 22min)
  - Section 3: Using Functions (45min)

- Section 4: Grouping Data and Computing Aggregates (42min)
  - Section 5: Using Subqueries (1hr 16min)
  - Section 6: Using the CASE Clause in Interesting Ways (40min)
  - Section 7: Advanced Query Techniques using Correlated Subqueries (37min)
  - Section 8: Working with Multiple Tables (1hr 33min)
  - Section 9: Window Functions for Analytics (1hr 11min)
  - Section 10: Difficult Query Challenges (4min)
- Microsoft Excel - Data Analysis with Excel Pivot Tables (6.85 hours)
  - Section 1: Getting Started (10min)
  - Section 2: Excel Pivot Table 101 (50min)
  - Section 3: Formatting Data with Pivot Tables (30min)
  - Section 4: Sorting, Filtering & Grouping Data with Pivot Tables (42min)
  - Section 5: Enriching Data with Pivot Table Calculated Values & Fields (1hr 13min)
  - Section 6: Visualizing Data with Excel Pivot Charts (55min)
  - Section 7: Excel Pivot Table Case Studies (2hr 31min)
  - Section 8: Wrapping Up (2min)
- Microsoft Power BI Desktop for Business Intelligence (11 hours)
  - Section 1: Getting Started (12min)
  - Section 2: Introducing Microsoft Power BI Desktop (19min)
  - Section 3: Connecting & Shaping Data (3hr 12min)
  - Section 4: Creating a Data Model (1hr 44min)
  - Section 5: Calculated Fields with DAX (3hr 55min)
  - Section 6: Visualizing Data with Reports (4hr 11min)
  - Section 7: Artificial Intelligence (AI) (47min)
  - Section 8: Power BI Optimization Tools (30min)
  - Section 9: BONUS PROJECT: Maven Market (9min)
  - Section 10: BONUS LESSON (2min)
- Power BI Masterclass from Scratch in 90 minutes [2023] (1.75 hours)
- Productivity and Time Management for the Overwhelmed (2 hours)
- Project Management Fundamentals (2.4 hours)
- Project Management: Master Project Management - PMP/PMI (2 hours)
- Python A-Z™: Python For Data Science With Real Exercises (11 hours)
  - Section 1: Welcome to the course (11min)
  - Section 2: Core Programming Principles (1hr 13min)
  - Section 3: Fundamentals Of Python (1hr 18min)
  - Section 4: Matrices (1hr 59min)
  - Section 5: Data Frames (1hr 59min)
  - Section 6: Advanced Visualization (2hr 36min)
  - Section 7: Homework Solutions (1hr 49min)
  - Section 8: Special Offer (2min)
- Python for Beginners: Learn Python Programming (Python 3) (2.8 hours)
- SAP Simplified for Absolute Beginners (2.5 hours)
- Scrum for Beginners + Scrum Master Certification Preparation (12.5 hours)
  - Section 1: Introduction (35min)
  - Section 2: Scrum Artifacts (1hr 19min)
  - Section 3: Scrum Events (1hr 7min)
  - Section 4: Scrum Team (43min)
  - Section 5: Introduction to the Agile approach and Scrum (26min)

- Section 6: Scaling Scrum (25min)
- Section 7: Terms and tools used in Agile and Scrum projects (40min)
- Section 8: Agile frameworks and practices (23min)
- Section 9: Frequently asked Scrum questions (26min)
- Section 10: Practice section #1 – Learning mode (5min)
- Section 11: Practice section #2 (10min)
- Section 12: Practice section #3 (2min)
- Section 13: Before taking the exam (12min)
- Section 14: Scrum live webinar – Scrum exam tips, live Q&A (6hr 56min)
- Section 15: Conclusion & Ask the instructor (8min)
- SharePoint Online (3.95 hours)
- Six Sigma: Certified Lean Six Sigma Green Belt | Accredited (6 hours)
  - Section 1: Introduction Lean Six Sigma Green Belt (15min)
  - Section 2: DMAIC Define Phase in Lean Six Sigma Green Belt (1hr 2min)
  - Section 3: DMAIC Measure Phase in Lean Six Sigma Green Belt (2hr 21min)
  - Section 4: DMAIC Analyze Phase in Lean Six Sigma Green Belt (1hr 16min)
  - Section 5: DMAIC Improve Phase in Lean Six Sigma Green Belt (43min)
  - Section 6: DMAIC Control Phase in Lean Six Sigma Green Belt (1hr 23min)
- Six Sigma: Certified Lean Six Sigma White Belt (Accredited) (2 hours)
- Six Sigma: Certified Lean Six Sigma Yellow Belt (Accredited) (8 hours)
  - Section 1: Welcome Six Sigma Yellow Belt: The Ultimate Six Sigma Certification (26min)
  - Section 2: Introduction: Kaizen vs. Lean vs. Six Sigma (12min)
  - Section 3: Six Sigma Methodologies and DMAIC Roadmap (16min)
  - Section 4: Define: Capture the Voice of Customer (8min)
  - Section 5: Define: Translate Voices to Requirements (14min)
  - Section 6: Define: Create a Project Charter (37min)
  - Section 7: Define: Create a SIPOC (13min)
  - Section 8: Measure: Create a Process Map (17min)
  - Section 9: Measure: Identify the 8 Wastes (19min)
  - Section 10: Measure: Identify the Data Types (15min)
  - Section 11: Measure: Create a Data Collection Strategy 1 (11min)
  - Section 12: Measure: Create a Data Collection Strategy 2 (11min)
  - Section 13: Measure: Introduction to Minitab (14min)
  - Section 14: Measure: Identify the Data Characteristics (18min)
  - Section 15: Measure: Check for Data Stability (12min)
  - Section 16: Measure: Identify DUDO (11min)
  - Section 17: Measure: Identify the Process Capability (13min)
  - Section 18: Analyze: Identify the Trivial Many Root Causes (35min)
  - Section 19: Analyze: Ascertain Critical Root Causes (11min)
  - Section 20: Analyze: Vital Few Root Causes (22min)
  - Section 21: Analyze: Analyze Vital Few Root Causes (15min)
  - Section 22: Analyze: Vital Few Root Causes – Analysis Techniques (20min)

- Section 23: Improve: Generate, Prioritize & Select Solutions (22min)
- Section 24: Improve: Pilot Solutions (7min)
- Section 25: Improve: Perform a Risk Analysis (5min)
- Section 26: Improve: Identify New Process Capability (7min)
- Section 27: Control: Sustain Improvements using Control Charts (18min)
- Section 28: Control: Create a Control Plan (6min)
- Section 29: Close: Replicate and Share Best Practices (11min)
- Section 30: Recap Section (14min)
- Section 31: AIGPE Six Sigma Yellow Belt – Certification Exam Guidelines and Exam Link (1min)
- Section 32: Bonus Content (16min)
- Skyrocket Your Creativity and Get Better Ideas: 7 Easy Ways (1 hours)
- Smart Tips: Communication (3 hours)
- Smart Tips: Soft Skills for Technical Professionals (2 hours)
- Smartsheet Project Management- Intermediate to Advanced (3 hours)
- Smartsheet Project Management- The Complete Beginners Course (4 hours)
- Speak Like a Pro: Public Speaking for Professionals (1 hours)
- Spotfire - The Complete TIBCO Spotfire Course (2.75 hours)
- SQL Programming Basics (1.4 hours)
- Tableau 2022 A-Z: Hands-On Tableau Training for Data Science (8.6 hours)
  - Section 1: Welcome Six Sigma Yellow Belt: The Ultimate Six Sigma Certification (26min)
  - Section 2: Introduction: Kaizen vs. Lean vs. Six Sigma (12min)
  - Section 3: Six Sigma Methodologies and DMAIC Roadmap (16min)
  - Section 4: Define: Capture the Voice of Customer (8min)
  - Section 5: Define: Translate Voices to Requirements (14min)
  - Section 6: Define: Create a Project Charter (37min)
  - Section 7: Define: Create a SIPOC (13min)
  - Section 8: Measure: Create a Process Map (17min)
  - Section 9: Measure: Identify the 8 Wastes (19min)
  - Section 10: Measure: Identify the Data Types (15min)
  - Section 11: Measure: Create a Data Collection Strategy 1 (11min)
  - Section 12: Measure: Create a Data Collection Strategy 2 (11min)
  - Section 13: Measure: Introduction to Minitab (14min)
  - Section 14: Measure: Identify the Data Characteristics (18min)
  - Section 15: Measure: Check for Data Stability (12min)
  - Section 16: Measure: Identify DUDO (11min)
  - Section 17: Measure: Identify the Process Capability (13min)
  - Section 18: Analyze: Identify the Trivial Many Root Causes (35min)
  - Section 19: Analyze: Ascertain Critical Root Causes (11min)
  - Section 20: Analyze: Vital Few Root Causes (22min)
  - Section 21: Analyze: Analyze Vital Few Root Causes (15min)
  - Section 22: Analyze: Vital Few Root Causes – Analysis Techniques (20min)
  - Section 23: Improve: Generate, Prioritize & Select Solutions (22min)
  - Section 24: Improve: Pilot Solutions (7min)
  - Section 25: Improve: Perform a Risk Analysis (5min)
  - Section 26: Improve: Identify New Process Capability (7min)

- Section 27: Control: Sustain Improvements using Control Charts (18min)
- Section 28: Control: Create a Control Plan (6min)
- Section 29: Close: Replicate and Share Best Practices (11min)
- Section 30: Recap Section (14min)
- Section 31: AIGPE Six Sigma Yellow Belt – Certification Exam Guidelines and Exam Link (1min)
- Section 32: Bonus Content (16min)
- The Python Bible™ | Everything You Need to Program in Python (9.15 hours)
  - Section 1: Course Introduction (3min)
  - Section 2: Installing Python, Getting Started & A Top Secret Tip (25min)
  - Section 3: Simple Little Boxes – Variables in Python (21min)
  - Section 4: The 123s – Numbers in Python (52min)
  - Section 5: The ABCs – How to use Strings to handle text in Python (1hr 24min)
  - Section 6: If This, then That: Logic and Conditional Flow in Python (43min)
  - Section 7: Hold This For Me: Python Datastructures (1hr 35min)
  - Section 8: Going Loopy – Loops In Python (1hr 6min)
  - Section 9: Getting Funky – Functions in Python (1hr 21min)
  - Section 10: OOPs! – Object Oriented Programming (OOP) in Python (1hr 18min)
  - Section 11: So, What's Next? + Resources (1min)
- TIBCO Cloud Spotfire Data Visualization and Analytics (1.75 hours)
- TIBCO Spotfire Development : Beginners To Advanced Course (4 hours)
- Unit Testing and Test Driven Development in Python (2 hours)



Retrainee-Job Creation

**Training Proposal for:**

**Advanced Integrated Pest Management**

**Contract Number: ET24-0237**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative HUA	Industry Sector(s):	Services Waste Management  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Sacramento, Placer, San Joaquin, Merced, Contra Costa, Santa Clara, Sonoma, San Diego, Sutter, Butte	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 209	U.S.: 209	Worldwide: 209
<u>Turnover Rate:</u>	14%		
<u>Managers/Supervisors:</u> (% of total trainees)	5%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$500,000

<b>Total ETP Funding</b>
\$316,560

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills	204	8-200	0	\$1,200	\$22.66
				Weighted Avg: 60			
2	Retrainee Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills	39	8-200	0	\$1,840	\$19.00
				Weighted Avg: 80			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1 (Retrainee): \$24.72 per hour for Santa Clara County; \$23.59 per hour for Contra Costa County; \$22.66 per hour for Sacramento, Merced, Placer, San Joaquin, Sonoma, San Diego, Sutter, and Butte counties.

Job Number 2 (Job Creation): \$20.60 per hour for Santa Clara County; \$19.66 per hour for Contra Costa County; \$18.54 per hour for Sacramento, Merced, Placer, San Joaquin, Sonoma, San Diego, Sutter, and Butte counties.

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

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

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

Up to \$1.60 per hour may be used to meet the Post-Retention Wage for Job Number 2.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee)</b>		
Administration	\$20.16 - \$25.00	25
Field Tech	\$20.16 - \$25.00	88
	\$25.01 - \$55.00	20
Sales Staff	\$20.16 - \$25.00	14
	\$25.01 - \$85.00	18
Team Lead	\$30.00 - \$85.00	39
<b>Job Number 2 (Job Creation)</b>		
Administration	\$19.00 - \$20.00	11
Field Tech	\$19.00 - \$20.00	28

**INTRODUCTION**

Founded in 1981 and headquartered in Roseville, Advanced Integrated Pest Management (Advanced IPM) ([www.advancedipm.com](http://www.advancedipm.com)) specializes in pest control services. Customers include residential and commercial property owners and operators of agricultural operations throughout California. Training under this proposal will be for its ten locations throughout California including

Sacramento, Placer, San Joaquin, Merced, Contra Costa, Santa Clara, Sonoma, San Diego, Sutter, and Butte counties. This is Advanced IPM's first ETP project.

## **Veterans Program**

Advanced IPM does not actively recruit Veterans, however, the Company accepts applications from Veterans.

## **PROJECT DETAILS**

Advanced IPM has implemented a training program focused on the safe and proper application of chemicals due to strict regulations. Staff must constantly keep up with changing pesticide regulations. Training will ensure that staff are able to safely and properly apply chemicals in accordance with all applicable regulations.

Advanced IPM has also invested over \$105,000 in new customer management software called Clypboard. Company-wide training on the software will allow Advanced IPM to track employee productivity, oversee system reporting, and record project times. This training will help Advanced IPM streamline its processes and remain competitive.

## **Retrainee - Job Creation**

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

Advanced IPM is expanding its office space and investing an additional \$1.25 million in lease space. The Company will hire 39 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 Classroom/Laboratory and E-Learning methods by In-house experts and vendors as needed in the following:

**Business Skills:** Training will be offered to all occupations and will focus on improving business processes. Training topics include Problem Solving & Decision Making, Project Management, and Transactional Analysis and Communication.

**Commercial Skills:** Training will be offered to Field Techs and Team Leads and focus on pest control practices. Training topics include Agricultural Spraying, Mosquito Control, and Residential Spraying.

**Computer Skills:** Training will be offered to all occupations and focus on the Company's internal software. Training topics include Clypboard and Microsoft Office Suite (Intermediate/Advanced).

## **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 San Joaquin, Merced, and Sutter counties 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 pre-retention wages.

However, the Company is not requesting a wage modification.

### **Commitment to Training**

Advanced IPM invests over \$350K annually on training for all of its locations. Training includes onboarding, safety training, and orientation. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### **➤ Training Infrastructure**

The Executive Team, with the support of the Executive Administrator and Operations Support Specialist, will be responsible for overseeing all training aspects of this project including scheduling training and collecting rosters. Each location will have a dedicated training facilitator. In-house subject matter experts and external vendors may be utilized to deliver training. Additionally, the Company has hired a third-party administrator with extensive ETP administration experience to work closely with staff to successfully complete the project.

### **DEVELOPMENT SERVICES**

Propel Consulting Services in El Dorado Hills assisted with development of this proposal for a flat fee of \$10,000.

### **ADMINISTRATIVE SERVICES**

Propel 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Accounting Basics
- Budgeting
- Conducting Productive Meetings
- Conflict Resolution
- Difficult Conversations
- Effective Communication
- Emotional Intelligence
- Leading Versus Managing
- Managing Meetings
- Motivating Teams
- Problem Solving & Decision Making
- Project Management
- Sales Skills
- Succession Planning
- Teambuilding
- Time Management
- Transactional Analysis and Communication

**Commercial Skills**

- Agricultural Spraying
- Commercial Spraying
- Flea Control
- Fumigation Training
- Leadership in Energy and Environmental Design (LEED) Training
- Lift Certification
- Mosquito Control
- Repertory Protection
- Residential Spraying
- Roach Control
- Rodent Control
- Sales Training
- Second-Generation Anticoagulant Rodenticides (SGAR) Training

**Computer Skills**

- Clympboard
- Microsoft Office Suite (Intermediate/Advanced)



Retrainee-Job Creation

**Training Proposal for:**

**CiminoCare**

**Contract Number: ET24-0246**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** J. Fetsch

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SET HUA Medical Skills Training Job Creation Initiative	Industry Sector(s):	Services Healthcare  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Butte, Glenn, Lassen, Sacramento, San Joaquin, Sutter, Yolo, Yuba	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 330	U.S.: 330	Worldwide: 330
<u>Turnover Rate:</u>	18%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$591,402

<b>Total ETP Funding</b>
\$386,147

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate SET Medical Skills Training	Business Skills, Computer Skills, Cont. Impr., Comm. Skills, MS-Didactic	6	8-200	0	\$1,242	\$30.90
				Weighted Avg: 54			
2	Retrainee Priority Rate SET	Business Skills, Computer Skills, Cont. Impr., Comm. Skills	20	8-200	0	\$1,035	\$30.90
				Weighted Avg: 45			
3	Retrainee Priority Rate SET HUA Medical Skills Training	Business Skills, Computer Skills, Cont. Impr., Comm. Skills, MS-Didactic	60	8-200	0	\$1,242	\$17.00
				Weighted Avg: 54			
4	Retrainee Priority Rate SET HUA	Business Skills, Computer Skills, Cont. Impr., Comm. Skills	59	8-200	0	\$1,035	\$17.00
				Weighted Avg: 45			
5	Retrainee Job Creation Initiative Priority Rate SET Medical Skills Training	Business Skills, Computer Skills, Cont. Impr., Comm. Skills, MS-Didactic	60	8-200	0	\$2,070	\$18.54
				Weighted Avg: 90			
6	Retrainee Job Creation Initiative Priority Rate SET	Business Skills, Computer Skills, Cont. Impr., Comm. Skills	61	8-200	0	\$1,610	\$18.54
				Weighted Avg: 70			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Numbers 1 & 2 (SET Modified): \$30.90 per hour in Lassen, Sacramento, and Yolo Counties. Job Numbers 3 & 4 (HUA): \$17.00 per hour in Butte, Glenn, San Joaquin, Sutter, and Yuba Counties. Job Numbers 5 & 6 (Job Creation): \$18.54 per hour in Butte, Glenn, Lassen, Sacramento, San Joaquin, Sutter, Yolo and Yuba Counties.

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

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

Up to \$2.50 per hour may be used in Job Numbers 1 & 2 and up to \$1.54 per hour may be used in Job Numbers 5 & 6 to meet the Post-Retention Wage.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		

Home Care Aide	\$28.40 - \$30.00	6
<b>Job Number 2</b>		
Food Service	\$28.40 - \$30.00	2
Housekeeping	\$28.40 - \$30.00	2
Support Staff	\$28.40 - \$30.00	2
Team Lead	\$28.40 - \$30.00	14
<b>Job Number 3</b>		
Home Care Aide	\$17.00 - \$20.00	40
	\$20.01 - \$25.00	20
<b>Job Number 4</b>		
Food Service	\$17.00 - \$20.00	8
	\$20.01 - \$25.00	12
Housekeeping	\$17.00 - \$20.00	8
	\$20.01 - \$21.00	2
Support Staff	\$17.00 - \$20.00	6
	\$20.01 - \$25.00	12
Team Lead	\$20.00 - \$25.00	3
	\$25.01 - \$30.00	8
<b>Job Number 5</b>		
Home Care Aide	\$17.00 - \$20.00	45
	\$20.01 - \$25.00	15
<b>Job Number 6</b>		
Food Service	\$17.00 - \$20.00	10
	\$20.01 - \$22.00	5
Housekeeping	\$17.00 - \$20.00	6
	\$20.01 - \$22.00	3
Support Staff	\$17.00 - \$20.00	8
	\$20.01 - \$25.00	7
Team Lead	\$20.00 - \$25.00	10
	\$25.01 - \$28.00	12

## **INTRODUCTION**

Founded in 1988 and headquartered in Citrus Heights, CiminoCare ([www.ciminocare.com](http://www.ciminocare.com)) provides Senior Housing and Care Services across Northern California. CiminoCare offers a range of Senior Care Services including Independent Living, Assisted Living, Memory Care, Transitional Care, Respite, Vacation Care and Hospice Care. Training will take place at the Company's headquarters and facilities in the following counties Butte (1), Glenn (1), Lassen (1), Sacramento (3), San Joaquin (1), Sutter (future site), Yolo (future site) and Yuba (future site). This project will include a closely related affiliate, River Fountains of Lodi. This is CiminoCare's first ETP Contract.

## Veterans Program

CiminoCare prioritizes the Veterans workforce and has assembled a marketing campaign that is specifically aimed at attracting Veterans. CiminoCare partners with the organizations “Hire a Vet” and “Troops to Trades” which aids in placing local Veterans into jobs. In the Northern and Central California markets, a large military and ex-military demographic exists. CiminoCare would like to employ and train those members of the military that have so generously served this country.

## PROJECT DETAILS

CiminoCare has created a training plan that specifically targets new workers that are entering into the healthcare field. Many workers retired or left the field during the COVID 19 pandemic. The Company has had to attract and train many workers who are brand new to the healthcare profession. The training plan includes resident safety, HIPPA, medication administration, infection control, food preparation, and cleaning protocols. The Company also provides a pathway and critical experience in the healthcare environment, many of their Home Care Aides go on to CNA, LVN or RN programs as well as other healthcare positions.

Much of the training during COVID-19 was virtual, resulting in trainees with little hands-on experience, especially in patient moving and handling. This has put the industry behind by almost two years, particularly for vocational education trainees with little operational training.

### 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 121 new employees (Job Numbers 5 and 6) to support the expansion into 2 locations in Yuba City and Marysville. 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 by experts and vendors as needed in the following:

**Business Skills:** Training will be offered to all occupations and will focus on upgrading communication skills for the business to run seamlessly. Training topics include Communication Skills, Client Relations, and Employee Engagement.

**Commercial Skills:** Training will be offered to Food Service and Housekeeping staff. Training will focus on sanitary regulations and food service standards. Training topics include Health Department and Sanitary Regulations, Procurement/Cost Control, Hygienic Cleaning, and Sanitizing.

**Computer Skills:** Training will be offered to all occupations and will focus on successfully operating medical software systems. Training topics include ATS Software, Microsoft Office (Immediate/Advanced), and Computer Operations.

**Continuous Improvement:** Training will be offered to all occupations and will focus on improving day to day functions at the facilities. Training topics include Medical Records, Customer Service, and Incident/Accident Management.

**Medical Skills (Didactic):** Training will be offered to Home Care Aids and will focus on providing skills to properly care for and treat patients. Topics include Infection Control, Dementia Care, Hazardous Waste Handling, and Patient Assessment and Care.

## **Commitment to Training**

CiminoCare's training budget is \$95,500 per facility for new hire orientations, company policies, basic training, staff development, 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**

The Company will have a site leader at each location who will coordinate training and collect training rosters. The site leaders will send completed rosters to a training administrator who will be responsible for overall administration of the project. Training will be provided by in-house experts and a training vendor. The Company has also hired an Administrative Subcontractor to assist with project administration.

## **Special Employment Training**

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

### **➤ Wage and Retention Modifications**

For trainees employed in a priority industry, the Panel may modify the wage up to 25% below the statewide average hourly wage (from \$41.20 to \$30.90). The Company requests this modification for Job Numbers 1 & 2. Approximately 26 Home Care Aides, Food Service, Housekeeping, Support Staff, and Team Leads will need the wage modification.

Trainees in Job Numbers 3 & 4 work in a HUA. This is a region with unemployment exceeding the state average by 25%. The Company's locations in Butte, Glenn, San Joaquin, Sutter, and Yuba Counties are in an HUA. These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. The Company requests a wage modification from \$30.90 per hour to \$17.00 per hour in Job Numbers 3 & 4 to serve workers in lower-wage occupations. Approximately 119 Home Care Aides, Food Service, Housekeeping, Support Staff, and Team Leads will need the wage modification.

## **DEVELOPMENT SERVICES**

Synergy Management Consultants, LLC in Grass Valley assisted with development of this proposal for a flat fee of \$15,000.

## **ADMINISTRATIVE SERVICES**

Synergy Management Consultants, LLC will also perform administrative services for a fee not to exceed 13% of payment earned.

## **TRAINING VENDORS**

Relias in Morrisville, North Carolina has been retained to provide Medical Skills training for a fee of \$25,650. Other trainers will be identified as they are retained. The contractor has retained this out of state vendor because it provides multi-lingual aide level courses, compliance training, and point of care training.

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Communication Skills
- Coaching for Team Leads
- Client Relations
- Employee Engagement

**Commercial Skills****Food Service**

- Kitchen Safety
- Health Department and Sanitary Regulations
- Nutrition
- Food Preparation and Timing
- Food and Beverage Equipment
- Cookware
- Glassware
- Serving
- Sanitization
- Procurement/Cost Control

**Housekeeping**

- Basic Cleaning
- Green Cleaning
- Sanitizing
- Pest Control
- Hazardous Waste
- Hygienic Cleaning
- Integrated Cleaning
- Sustainability
- Tools and Equipment
- Dust and Dirt Removal
- Surfaces
- Spill Control
- Stairways
- Cleaning Protocols

**Computer Skills**

- ATS Software
- Microsoft Office (Intermediate/Advanced)
- Computer Operations

**Continuous Improvement Skills**

- Administration
- Medical Records

- Customer Service
- Team Building
- Working with Teams
- Problem Analysis and Problem Solving
- Culturally Appropriate Care
- Interdepartmental Collaboration
- Interdisciplinary Team
- Incident/Accident Management
- Resident Centered Care
- Mobility Skills
- Documentation
- Continuous Quality Improvement Workshop

**Medical Skills (Didactic)**

- Medication Management
- Activities of Daily Living
- Infection Control
- Resident Emergency Response
- Patient Safety
- Clinical Skills Review
- Incontinence Management (colostomy care, urinary catheter care)
- Patient Assessment and Care
- Dementia/Alzheimer's
- Residents with Special Needs
- Dementia Care
- Incontinence Management (colostomy care)
- Functional mobility and ambulation
- Identification of skin impairments and prevention
- Identification of Patient Change in Condition
- Monitoring of cardiovascular changes such as vital signs, endurance, level of consciousness
- Breathing Patterns and Respiratory Function
- Pain management
- Monitor blood pressure of patients
- Positioning of patients for correct body alignment
- Conduct range of motion exercises with patient
- Patient Care of Foot and Hand
- Charting
- Colostomy Care
- Hazardous Waste Handling
- Isolation Techniques
- Safe Patient Handling
- Equipment/Modalities
- Assistive Devices
- HIPPA
- Resident Safety
- Medication Administration



Retrainee-Job Creation

**Training Proposal for:**

**FM Industries, Inc.**

**Contract Number: ET24-0254**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** M. Sladewski

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 602	U.S.:837	Worldwide: 20,000	
<u>Turnover Rate:</u>	19%			
<u>Managers/Supervisors:</u> (% of total trainees)	7%			

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$650,000

<b>Total ETP Funding</b>
\$324,760

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills, Cont. Improv., Manufacturing Skills, PL- Manufacturing Skills	323	8-200	0-60	\$920	\$30.00
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation Initiative	Computer Skills, Cont. Improv., Manufacturing Skills, PL- Manufacturing Skills	15	8-200	0-60	\$1,840	\$27.00
				Weighted Avg: 80			

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

**Minimum Wage by County: Job Number 1:** \$24.72 per hour for Alameda County.

**Job Number 2 (Job Creation):** \$20.60 per hour for Alameda County.

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

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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 - Retrainee</b>		
Engineers	\$40.00 - \$60.00	48
Inspectors	\$30.00 - \$50.00	50
Machinists	\$35.00 - \$57.00	200
Managers/Supervisors	\$43.00 - \$60.00	25
<b>Job Number 2 - Job Creation</b>		
Engineers	\$38.00 - \$59.00	5
Inspectors	\$27.00 - \$49.00	5
Machinists	\$32.00 - \$56.00	5

**INTRODUCTION**

Founded in 1989 and headquartered in Fremont, FM Industries, Inc. (FMI) ([www.fmindustries.com](http://www.fmindustries.com)) is a subsidiary of NGK Group. FMI is a contract manufacturer and supplier of precision-machine parts and components made for the semiconductor-equipment industry. The Company specializes in engineered-thermal coating, anodization, and cellular manufacturing. Its services range from horizontal and vertical milling, turning, 5-axis machining, and heat treating. The Company's principal operating facilities are in Fremont with a second facility in Livermore and an advanced coating plant in Phoenix, Arizona. ETP-funded training will be delivered at its Fremont and Livermore facilities.

FMI's customer base includes leading semiconductor equipment manufacturers and associated industries, such as Applied Materials and Lam Research.

This will be FMI's third ETP Contract, and its third within the last five years. FMI sees strong demand for its semiconductor components and assemblies because the industry is experiencing growth in demand from markets for artificial intelligence (AI), electric vehicles, and 5G wireless technology. Also, the CHIPS and Science Act, signed into law by President Biden on August 9, 2022, provides about \$280 billion in new funding to reinforce domestic research and the manufacturing of semiconductors in the United States.

### **Veterans Program**

Although the Company has no formal plans for recruiting veterans and this proposal does not include a separate Veteran's Job Number, veterans will be enrolled in this ETP Contract.

### **PROJECT DETAILS**

The previous project focused on Lean Manufacturing processes, continuous improvement programs, and general management and professional development courses. Under this proposal, training will be focused on upskilling and reskilling employees in the areas of advanced CNC machine tools (upgrades to current tools and purchases of new tools) as well as Operational Disciplines, Enterprise Resource Planning and Quality Management Systems to improve accuracy, flexibility, and overall performance.

FMI's recent investment in new equipment provides it with a competitive advantage and differentiation in the marketplace but places a heavy burden on worker proficiency. In response, FMI is rolling out training programs for its front-line manufacturing workforce on new technologies, continuous improvement, advanced software systems, advanced CNC equipment and professional development. All training courses are based on new technology, processes, software, quality/reliability systems and equipment.

### **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.

FMI is expanding business capacity by hiring new employees. The Company will hire 15 new employees (Job Number 2). The outlook for Semiconductor Industry suppliers is good. The Company's hiring goals are in alignment with industry experts who consider the outlook for increased demand for semiconductor equipment in 2024 and beyond is good based on the CHIPS and Science Act mentioned above. Because of the specialized, technical nature of the business, FMI has a heightened need to attract and retain qualified engineers, inspectors, machinists, and supervisors. To secure new talent, FMI is increasing its commitment and resources to worker training and creating an environment of training to advance employee success and careers. 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, Productive Lab (PL) and Computer-Based Training (CBT) in the following:

**Computer Skills:** This training will be offered to all occupations. Course topics include Advanced Desktop Applications, Management and Manufacturing Control Systems, and Programming Languages. Training will improve trainee skills in the Company's new software and advanced applications for account management, inventory, and manufacturing control.

**Continuous Improvement:** This training will be offered to all occupations. Course topics include Epicor 10, Operational Discipline, Process Improvement Training, and Quality Management Systems. Trainees will learn techniques to reduce costs, reduce process variation, and improve problem-solving and quality.

**Manufacturing Skills:** This training will be offered to Engineers, Inspectors, and Machinists. Course topics include Computer Numerical Control (CNC) Machine Operations, Multiple Machine Procedures, and Testing and Troubleshooting. The main objective is to retrain FMI's front-line manufacturing workforce in the design, development, production, operation, maintenance, and calibration of advanced CNC equipment.

### **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. Frontline manufacturing associates who directly interface with new and/or improved manufacturing processes, or new equipment will receive PL training. The proposed PL training will provide cross-training opportunities on the many production lines/procedures used throughout the manufacturing facility. The projected number of employees who will attend PL training are all inspectors, machinist, and engineers for a total 312 workers. All PL training will occur on the shop floor setting conducted by a qualified trainer. During ETP-funded training, the trainer's time will be dedicated to the delivery of PL to the trainee.

PL- Manufacturing Skills will be delivered for Job Number 1 (10 hours per trainee) and Job Number 2 (20 hours per trainee). The trainer-to-trainee ratio for all PL training will be 1:1. PL training will be taught by a combination of highly skilled internal production supervisors/trainers, technicians, and engineers. Trainees observe real production procedures demonstrated by the lab trainer and will practice their skills under the supervision of the trainer. Upon certification of their competency, trainees can independently produce goods that are for sale. PL training certificates and attendance records are stored in PDF format in the Learning Management System (LMS) using Cornerstone OnDemand software (CSOD). The course content is also stored in the LMS along with individual training plans.

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

### **Commitment to Training**

FMI's annual training budget in California is over \$500,000. FMI currently funds all training in OSHA and FDA-mandated safety regulations, sexual harassment prevention, rudimentary job skills, basic desktop training (Microsoft Word, Excel, and PowerPoint), and executive development 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**

Training will be administered under FMI's training department which oversees the workforce training across the organization and operates under the direction of the Director. FMI will be

responsible for administering the ETP program and work directly with a third-party administrator: Herrera & Company. Also, there will be several full-time administration training staff within FMI assigned to this project to work with its third-party administrator and with ETP.

### **Electronic Recordkeeping/ LMS**

FMI will be using the Cornerstone OnDemand software system (CSOD) for this project. The Company has used this system for five years, including the last two contracts. The Training Coordinator is the LMS' designated system administrator. ETP has reviewed and approved the Company's Learning Management System (LMS).

### **ACTIVE PROJECTS**

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

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Retained	Potential Earnings (Based on Tracked Hours) (\$ %)
ET22-0203	\$496,800	12/20/2021 – 12/19/2023	345	485	\$325,118 (65%)*

\*Based on ETP Systems, 20,052 reimbursable hours have been tracked for potential earnings of \$325,118 (65% of approved amount). The Contractor projects final earnings of 65% based on training currently committed to by employers and in progress through September 2023. FMI fell short of earning all ETP funds due to the decrease of its production/sales through 2023. The reduced revenue was due to President Biden's executive order restricting the sale of semiconductors and chip-making equipment to China. The new export controls banned the export of cutting-edge chips, chip design software, and US-built components of manufacturing equipment (FMI's specialty). FMI expects production and sales to increase in 2024, due to the increase in demand for semiconductors and the CHIPS Act. The new project has been right-sized to the potential earnings amount.

### **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 \$ %
ET20-0224	Fremont, Livermore	12/23/2019 – 12/22/2021	\$362,250	\$362,250 (100%)

### **DEVELOPMENT SERVICES**

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

### **ADMINISTRATIVE SERVICES**

FMI 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: Curriculum****Class/Lab/E-Learning**

8-200

Trainees may receive any of the following:

**Computer Skills**

- Advanced desktop applications
- Management and manufacturing control systems
- Materials and logistics software development
- Programming languages
- Project management software tools
- Operating system programming language

**Continuous Improvement Skills**

- Automated Quality Management (AQM)
- Change management
- Customer communications and awareness
- Effective teams
- Epicor 10
- Facilitation skills and mentorship
- Finance and accounting skills
- Internal auditing
- Lean Six Sigma
- Leadership / Coaching Skills
- Marketing promotion and position
- Operational discipline
- Problem solving tools and technique
- Process improvement training
- Product knowledge and market validation
- Quality fundamentals/core skills
- Quality management systems
- Strategic sales negotiation techniques
- Technical presentations

**Manufacturing Skills**

- Application Engineering Services
- Beamer Laser Marking Machine Factory Training
- Computer Numerical Control (CNC) Machine Operations
- Instrument modeling/integration software
- Making Measurements
- Mathematics of Machining
- Measurement sciences practice and theory
- Metal Cutting Fundamentals
- Multiple Machine Procedures
- Portable Power Tools
- Multipart machine automation development
- Multi-scale modeling for nonmaterial design

- Reading Blueprints, Schematics and Symbols
- Rigging and Equipment Installation
- System data modeling and architecture
- Testing and Troubleshooting
- Technical Qualifications and Certifications
- System data modeling and architecture

### **Productive Lab (Trainer-to-Trainee Ratio 1:1)**

Trainees may receive any of the following:

#### **Manufacturing Skills**

- Advanced programming development applications
- Application Engineering Services
- Beamer Laser Marking Machine Factory Training
- Computer Numerical Control (CNC) Machine Operations
- Factory automation tools and techniques
- Instrument modeling/integration software
- Making Measurements
- Mathematics of Machining
- Measurement sciences practice and theory
- Metal Cutting Fundamentals
- Multiple Machine Procedures
- Multipart machine automation development
- Multi-scale modeling for nonmaterial design
- Portable Power Tools
- Reading Blueprints, Schematics and Symbols
- Rigging and Equipment Installation
- System data modeling and architecture
- Testing and Troubleshooting
- Technical Qualifications and Certifications

### **Computer-Based Training**

Trainees may receive any of the following:

#### **Computer Skills**

- Advanced desktop applications (2 hrs.)
- Customer Relationship Management Systems (1 hr.)
- Management and Manufacturing Control Systems (1 hr.)
- Materials and logistics software development (6 hrs.)
  - Business Intelligence (2 hr.)
  - Data Analytics (1 hr.)
  - Introduction to Logistics (1 hr.)
  - Design tools and practices (1 hrs.)
  - Product transfer/workflow (1 hrs.)
- Operating system programming language (1 hr.)
- Programming languages (1 hr.)

- Project management software tools (1.5 hrs.)
- Single-Vendor Enterprise Resources Planning (1 hr.)

**Continuous Improvement Skills**

- Business Excellence and Finance (6 hrs.)
  - Capital Budgeting (1 hr.)
  - Decision Making (1 hr.)
  - Financial Risk Management (1 hr.)
  - Financial Statement Analysis (1 hr.)
  - Socially Responsible Investing (1 hr.)
  - Working Capital Management (1 hr.)
- Customer communications and awareness (3 hrs.)
- Effective Teams (4 hrs.)
- Finance and accounting skills (2 hrs.)
- Manufacturing Procedures and Protocols (3 hrs.)
- Manufacturing Quality and Reliability (2.5 hrs.)
- Marketing promotion and position (2 hrs.)
- Problem Solving Tools and Techniques (3 hrs.)
- Process and Capability Mapping (1.5 hrs.)
- Product knowledge and market validation (2.5hrs.)
- Production System Procedure Review (0.5 hr.)
- Quality Management Systems (QMS) Procedures (1 hr.)
- Technical presentations (1.5hrs.)
- Sales and Negotiation Skills (1 hr.)



Retrainee-Job Creation

**Critical Proposal for:**

**Infinity Energy, Inc. dba Infinity Energy**

**Contract Number: ET24-0255**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** J. Dongallo

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative RESPOND (Core Funds) HUA	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Butte, Fresno, Kern, Los Angeles, Placer, Riverside, San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 585	U.S.:880	Worldwide: 880
<u>Turnover Rate:</u>	9%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$1,396,100

<b>Total ETP Funding</b>
\$661,020

## **TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Manufacturing Skills, Advanced Technology	345	8-200	0	\$690	\$22.66
				Weighted Avg: 30			
2	Retrainee Priority Rate HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Manufacturing Skills, Advanced Technology	115	8-200	0	\$828	\$20.00
				Weighted Avg: 36			
3	Retrainee Priority Rate Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Manufacturing Skills, Advanced Technology	285	8-200	0	\$1,150	\$20.00
				Weighted Avg: 50			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$22.66 per hour for Butte, Placer, Riverside and San Diego Counties and \$24.72 per hour for Alameda County. Job Number 2 (HUA): \$17.00 per hour for Los Angeles, Kern and Fresno Counties. Job Number 3: \$18.54 per hour Butte, Placer, Riverside, Los Angeles, Kern, Fresno and San Diego Counties and \$20.60 per hour for Alameda County.

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1. Up to \$0.60 per hour may be used to meet the Post-Retention Wage for Job Number 3.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1: Retrainee</b>		
Customer Service	\$22.25 - \$25.00	20
	\$25.01 - \$30.00	20
Engineer Staff	\$40.00 - \$55.00	55
Installer/Technician	\$22.22 - \$25.00	70
	\$25.01 - \$41.00	115
Warehouse/Inventory	\$20.16 - \$25.00	25
	\$25.01 - \$32.00	30
Surveyor	\$22.25 - \$25.00	5
	\$25.01 - \$30.00	5

<b>Job Number 2: Retrainee/HUA</b>		
Customer Service	\$20.00 - \$25.00	15
	\$25.01 - \$30.00	10
Installer/Technician	\$22.75 - \$25.00	35
	\$25.01 - \$35.00	30
Warehouse/Inventory	\$20.00 - \$25.00	15
	\$25.01 - \$30.00	10
<b>Job Number 3: Job Creation</b>		
Customer Service	\$20.00 - \$25.00	15
	\$25.01 - \$30.00	10
Engineer Staff	\$40.00 - \$55.00	35
Installer/Technician	\$20.00 - \$25.00	50
	\$25.01 - \$41.00	50
Warehouse/Inventory	\$20.00 - \$25.00	15
	\$25.01 - \$26.00	15
Fabricator Welder	\$23.00 - \$25.00	35
	\$25.01 - \$40.00	50
Surveyor	\$20.00 - \$25.00	6
	\$25.01 - \$25.00	4

## **RESPOND**

Infinity Energy, Inc. dba Infinity Energy (Infinity Energy) is a “Critical Proposal” designation under the Rapid Employment Strategies Pilot on Natural Disasters (RESPOND) program, in which the Panel funds training for economic recovery from natural disasters, such as wildfires. 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.

Wildfire is impacting several key industry sectors (e.g. agriculture and manufacturing) all throughout California and could lead to loss of jobs. The continued development of stationary power sources and ZEV infrastructures could result in better mitigation/prevention of potential fire disasters. This proposal is deemed as RESPOND project based on the Company’s impact on addressing natural disasters in fire-impacted regions in California.

## **INTRODUCTION**

Founded in 2014, Infinity Energy, Inc. (Infinity Energy) ([www.goinfinityenergy.com](http://www.goinfinityenergy.com)) provides green energy solutions to consumers and businesses. The Company’s core business includes solar, battery storage, and Electric Vehicle (EV) charging capabilities. Customers are energy consumers, businesses and government/educational facilities located throughout California, Texas, Nevada and Arizona. Infinity competes with other power and infrastructure companies located in Nevada, Washington, Arizona, Oregon, Texas and North Carolina.

Infinity Energy installs EV charging stations in partnership with Evoke Systems, targeting rural areas. The Company has developed a proprietary fast direct current (DC) charging system that is a self-sustaining, solar powered battery storage. These EV charging stations are located in community colleges, government buildings and large employer sites. The Company’s system is created to alleviate grid demand as the rise in demand of EV charging continues.

The Company is headquartered in Rocklin, with other California locations in Compton, Riverside, Temecula, Bakersfield, Fresno, Chico, Pleasanton, San Diego and Escondido. Infinity also has operations in Houston, Texas. Training in this proposal will be provided to employees at all California locations.

This will be Infinity Energy's second ETP Contract and second in the last five years.

### **Veterans Program**

Although there is not a dedicated Veterans job number, Infinity Energy is committed to hiring and retraining Veterans. In addition, the Company has a Veterans outreach program through online employment websites and other organizations such as, "Hire a Vet" and "Troops for Trade" for recruiters to source and contact Veterans.

### **PROJECT DETAILS**

The electric vehicle culture and infrastructure has grown significantly since the inception of State and Federal mandates advocating for decrease of non-combustible engines by 2030. While California remains at the forefront of ZEV adaptation in most metropolitan areas, large rural areas still lack and need efficient charging infrastructures. California needs to build the infrastructure to support a widespread change in passenger vehicle methodology and use. In the previous proposal, training focused on the Company's processes and procedures as it relates to the State and Federal mandates for ZEV by 2030. Training for this project will focus on product/brand specific processes and operations for its solar and storage battery business component regarding new product technology upgrades, as well as, training for employees that were not previously trained. Although training topics in this proposal are similar to those provided in prior projects, trainees will not repeat the same training courses previously received.

Infinity Energy both manufactures and installs proprietary EV charging stations. As this technology evolves, training is required for both incumbents and new employees in all facets of the manufacturing/assembly and installation processes. The Company embarked on a new patented EV charging platform last year and expects industry demand to create over 285 new jobs in the next 18 months. This requires training on the Company's various technological components and how they are both interrelated with use and installation processes. This will include EV charging with Solar components, long term battery storage solutions, and EV battery parts. The Company is expanding its manufacturing specialties to incorporate EV Lithium Ion batteries. Infinity Energy has contracted with Tynergy LLC as the consulting branch of the EV battery operations and will begin operations in Jan 2024 at the Fresno location.

Lastly, Infinity Energy will focus on its day-to-day operations to develop new strategies; increase short-term, cost-saving opportunities; and improve performance to ensure that its operation infrastructures are aligned with the Company's long-term goals to improve customer services. Training will ensure all regulatory changes are met while improving quality processes, outcomes and measures. In addition, enhancing employee skills will enable Infinity Energy to remain competitive within the industry and offer higher workplace promotional opportunities.

### **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, Infinity Energy will continue to expand business capacity and training programs. The Company will hire 285 new employees (Job Number 3) over the next 18 months to support

its ForEVR EV charging and EV Battery manufacturing program that will be primarily placed in the Central Valley, Fresno and Bakersfield locations. 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 and Advanced Technology. Training will be delivered by in-house experts and vendors as needed in the following:

**Business Skills:** Training will be offered to all occupations with a focus on Administrative and Customer Support. Training topics include Collaboration Skills, Cost Analysis, Identifying Relevant Information, Presentation Skills, Probing Questions, Vetting Information Quality, Virtual Presentations and Writing Skills.

**Commercial Skills:** Training will be offered to all trainees to provide product and equipment knowledge necessary to address customer questions, facilitate proper sales and code recommendations when advising customers. Training will provide skills in AC Disconnects, Battery System Tools, Drone, Operation, EV Load Requirements, EV Solar Integration, Ground Rod Installation, Generac Installs, Interconnection, Phase Testing, Tesla Commissioning, Touchstone Portal and Utility Site Survey.

**Computer Skills:** Training will be offered to all occupations and focus on the Company's proprietary software applications, as well as, using tablet programs in the field. Training topics include Ground Mount Designs, Canvass App, Project Sunroof (Google Tool), Roof Mount Designs, and Solar CAD Basics.

**Continuous Improvement:** Training will be offered to all occupations on Building Teams, Delegating, Developing Leaders, and Root Cause Analysis.

**Manufacturing Skills:** Training will be offered to Installer/Technician, Engineering, and Fabricator Welder on course topics like Assembly, Computerized Numerical Control (CNC), Quality Control, Reading Blueprints, Stamping, Testing and Welding. Training will focus on new production techniques for more efficient production.

**Advanced Technology:** Training will be offered to Installer/Technician, Engineering, and Fabricator Welder on course topics like Battery Cell Parameters, Battery Pack Considerations, Cell and Pack Level Testing, Lithium Ion Cell Architecture and Lithium Ion Cell Chemistry. Training will focus on new production techniques and Lean processes to ensure efficient production.

## Commitment to Training

Infinity Energy spends \$1,125,000 per year on training in California. The Company provides new hire orientation, safety training, California labor laws and regulations, basic computer skills, violence in the workplace prevention, and sexual harassment prevention. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

The Director of Talent Management will oversee this project. Ten HR Coordinator/Managers at each facility will also be responsible for administration at their particular facility. A third party administrator will assist with the implementation, compliance, reporting and reimbursements for the Contract. Training will be delivered by in-house experts and vendors as needed. Other trainers will be identified as they are retained.

**High Unemployment Area**

Trainees in Job Numbers 2 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in Fresno, Los Angeles, and Bakersfield counties 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 pre-retention wages. Infinity Energy is requesting a wage modification for only Job Number 2 from \$22.66 per hour to \$20.00 per hour. Approximately 30 Customer Service and Warehouse/Inventory (from Job Number 2) will need the wage modification.

**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 \$ %
ET21-0304	Multiple Locations	6/28/2021– 6/27/2023	\$437,000	\$437,000 (100%)

**DEVELOPMENT SERVICES**

The Company retained Synergy Management Consultants in Grass Valley to assist with development of this proposal for a flat fee of \$36,000.

**ADMINISTRATIVE SERVICES**

The Company also retained Synergy Management Consultants to provide administration services for a fee not to exceed 13% of payment earned.

**TRAINING VENDORS**

The Company also retained training subcontracts with the following vendors who specialize in Manufacturing Skills and Manufacturing Skills - Advanced Technology courses listed in the Curriculum. Below is the list of Companies, Locations and Cost of Service.

- Generac, Sacramento CA \$42,500
- Enphase Los Angeles CA \$37,450
- Snap and Rack, San Francisco CA \$34,500
- Solar Edge Torrance CA \$32,500
- Tynergy (Fresno CA) \$50,500

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Accountability In Communications
- Business Acumen
- Coaching basics
- Collaboration Skills
- Complex Designs Solutions
- Cost Analysis
- Creative Brainstorming
- De-Escalating Customers
- Developing an Action Plan
- Developing measurement metrics
- Identifying Barriers to Communication for Others
- Identifying Relevant Information
- Key Principles of Good Customer Communication
- Presentation Skills
- Probing Questions
- Rapport Building Strategies
- Regulatory Agencies
- Strategy Development
- Tactical and Calibrated Questioning
- Vetting Information Quality
- Virtual Presentations
- Writing Clear Instructions
- Writing Skills

**Commercial Skills**

- AC Disconnects
- Batteries- Tesla, Enphase, ForEVeR
- Battery System Tools
- Commercial Charging Station Requirements
- Commissioning
- Drone Operation
- Generating Quotes & Proposal in Sunnova
- Greensky Product Knowledge
- Ground Mounts
- Emergency Disconnect
- Enphase Commissioning
- Enphase Encharge - Partial Home Backup
- Enphase Encharge - Whole Home Backup
- Enphase IQ Combiner 3
- EV battery Storage Integration
- EV Load Requirements

- EV Safety Procedures
- EV Solar Integration
- EV Testing and Diagnostics
- Evoke Forever Charger Installation
- Forever Conductors and Ampacity
- Forever EV Wire Sizing and Electrical
- Forever Products Overcurrent Protection
- Gateway, Combiner Box, and ATS Switches
- Generac Automatic Transfer Switches
- Generac Installs
- Ground Rod Installation
- Home Charging Station Requirements
- Installation of Solar, Battery, Roofing and EV Charging
- Installation Prep
- Interconnection
- Introduction to Permitting
- Introduction to Proposals
- Inverters
- Main and Sub Panels Tesla/ Generac/ ForEver Battery install
- Merging Aurora Design Into Touchstone
- Net Metering Program
- Online Validation (Sunnova)
- Photo and Video Standards
- Preparing Touchstone for Sunnova
- Modules
- Phase Testing
- PW2GW2 - AC Wiring Enphase or Tesla
- PW2GW2 - CT Installation
- PW2GW2 - Equipment Mounting
- PW2GW2 - Install Preparation
- PW2GW2 - System Commissioning
- PW2GW2 - Updating the Gateway
- Rapid Shutdown
- Roof Mounted - Microinverters
- Roof Mounted - String Inverter
- Salal Product Knowledge
- Software reporting functioning
- Sunlight Product Knowledge
- Sunnova Product Knowledge
- Sunrun Product Knowledge
- Tesla and Enphase Junction Boxes
- Tesla Commissioning
- Tesla Conduit Penetration Flashing
- Tesla Gateway 2
- Tesla Powerwall 2 - Partial Home Backup
- Tesla Powerwall 2 - Whole Home Backup
- Touchstone Portal
- Utility site survey

### **Computer Skills**

- Authorities Having Jurisdiction (AHJ)
- Canvass App
- Ground Mount Designs
- Introduction to CAD
- MS Office - Intermediate/Advanced
- Project Sunroof (Google Tool)
- Roof Mount Designs
- Solar + Storage Designs
- Solar CAD Basics
- Touchstone Portal
- Using Field Tablets

### **Continuous Improvement Skills**

- Building Teams
- Coaching for Leaders
- Delegating
- Delivering Feedback
- Developing Leaders
- Effective Meetings
- Problem Solving
- Root Cause Analysis

### **Manufacturing Skills**

- Assembly
- Computerized Numerical Control (CNC)
- Cutting
- Quality Control
- Reading Blueprints
- Safety Skills
- Stamping
- Testing
- Tools
- Welding

### **Manufacturing Skills - Advanced Technology**

- Battery Cell Parameters
- Battery Fundamentals and Classification
- Battery Management Systems
- Battery Pack Considerations
- Battery Thermal Management System
- Battery Pack Assembly
- Cell and Pack Level Testing
- Lithium Ion Cell Architecture
- Lithium Ion Cell Chemistry



Retrainee-Job Creation

Training Proposal for:

**Jon K. Takata Corporation dba Restoration Management  
Company**

**Contract Number: ET24-0252**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative SET HUA RESPOND (Core Funds)	Industry Sector(s):	Services (G) Waste Management (56)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Los Angeles, San Mateo, Riverside, San Diego, Sacramento, San Joaquin, Solano, Santa Clara, Orange	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 469	U.S.: 570	Worldwide: 570
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

All funding is from the "core" Employment Training Fund as authorized for the RESPOND program.

In-Kind Contribution
\$605,878

Total ETP Funding
\$594,895

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate SET	Commercial Skills, Computer Skills, Continuous Impr, HazMat, OSHA 10/30	409	8-200	0	\$1,150	\$22.66
				Weighted Avg: 50			
2	Job Creation Initiation Priority Rate SET	Commercial Skills, Computer Skills, Continuous Impr, HazMat, OSHA 10/30	57	8-200	0	\$2,185	\$20.50
				Weighted Avg: 95			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** **Job Number 1:** \$24.72 per hour for Alameda, San Mateo, Santa Clara counties; \$22.66 for Los Angeles, Orange, Riverside, Sacramento, San Diego, Solano, and San Joaquin counties. **Job Number 2:** \$20.60 for Alameda, San Mateo, and Santa Clara counties; \$18.78 for Los Angeles county; \$18.54 for Orange, Riverside, Sacramento, San Diego, Solano, and San Joaquin counties.

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

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

Up to \$2.46 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
<b>Job Number 1: (Retrainee)</b>		
Administrative Staff	\$20.20 - \$25.00	16
	\$25.01 - \$40.00	25
Emergency Response Coordinators	\$36.06 - \$48.06	2
Emergency Response Planners	\$24.04 - \$25.00	3
	\$25.01 - \$34.04	2
Frontline Manager/Supervisors	\$22.00 - \$25.00	6
	\$25.01 - \$65.00	22
Lead Technicians	\$22.00 - \$25.00	50
	\$25.01 - \$40.00	98
Lead Technicians II	\$27.37 - \$49.00	8
Operations Staff	\$28.85 - \$43.25	13
Project Analysts	\$25.24 - \$40.00	31
Project Leaders	\$31.25 - \$52.00	14
Project Specialist	\$22.00 - \$25.00	24
	\$25.01 - \$30.00	10
Regional Coordination Experts	\$36.06 - \$59.71	3
Safety Leaders	\$33.65 - \$49.00	1

Safety/Facility Leaders	\$36.06 - \$36.06	1
Safety Training Supervisors	\$43.27 - \$54.27	1
Technicians	\$20.50 - \$25.00	53
	\$25.01 - \$35.00	26
<b>Job Number 2: (Job Creation)</b>		
Emergency Response Planners	\$24.04 - \$25.00	1
Supervisors	\$22.00 - \$25.00	1
Lead Technicians	\$22.00 - \$25.00	20
Lead Technicians II	\$24.04 - \$25.00	30
Technicians	\$20.50 - \$25.00	5

## 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 wildfire. Wildfire is impacting several key industry sectors (e.g. agriculture) and could lead to loss of jobs. Jon K. Takata dba Restoration Management Company (RMC) will be training and upskilling workers on clearing wildfire debris and floods.

## INTRODUCTION

RMC ([www.restorationmanagementcompany.com](http://www.restorationmanagementcompany.com)), founded in 1985 and headquartered in Hayward, provides disaster response services including emergency mitigation for single homes, businesses and commercial buildings. The Company responds to regional catastrophes and provides remedial-environmental services including asbestos and lead abatement in addition to key-client demands such as mold, fire and water damage services. RMC's customer base includes private and commercial property managers, business owners, city managers and local government. The Company also serves hospitals, medical-facility managers, insurance providers, real-estate brokers and agents, building consultants, and home-owner associations. ETP-funded training will be delivered at its ten facilities (Los Angeles, Hayward, Benicia, San Jose, Stockton, San Diego, Sacramento, Lake Forest, Riverside and San Mateo) located throughout Northern and Southern California. This will be RMC's third ETP Contract and the third in the last five years.

## Veterans Program

RMC actively recruits and hires Veterans. Job openings are posted in different sites focused on Veterans including the State of California Employment Development Department. For the ease of administering the Contract, Veterans will be included in both job numbers.

## PROJECT DETAILS

With the rampant fires, flooding, hurricanes, and lasting effects of the COVID19 pandemic, RMC's requested services has been the highest in its history. RMC is requesting funding under RESPOND as they provide emergency rapid response for catastrophic services (fire, flooding) to California. RMC serves those whose lives have been disrupted by property damage and strive to provide the best experience possible by leveraging the latest technologies and comprehensive training for continued improvement. RMC restores property to the highest standard and enables hope and stability for those affected.

In the prior Contract, RMC focused training on its new Enterprise Resource Planning (ERP) software, infrared cameras, and GPS units. For this Contract, training will focus on green initiative and remediation. RMC diverts up to 50 percent of recyclable debris from landfills and must train all occupations on the Company's waste management plan. Trainees will learn how to recognize potential hazardous and recyclable materials and receive extensive training on how to separate hazardous materials from debris, what can be broken down and recycled, and what salvageable products are reusable.

Training will also focus on specialized remediation including water damage restoration, fire and smoke damage, and asbestos abatement to ensure projects are handled accurately and safely. Due to the mitigation need in California, RMC is upskilling and certifying current and incoming employees to become part of emergency teams and be ready to deploy and assist throughout California. Training provides trainees knowledge to evaluate damage, develop a plan to contain it, and find a solution to fix the situation.

Frontline Manager/Supervisors, Lead Technicians, Operations Staff, Project Leaders, and Technicians will receive training on the new fleet vehicles fitted for RMC's direct needs including new electric vehicle trucks. Training will provide the occupations knowledge of how to safely operate the new fleet of vehicles.

All occupations will receive training on the new Geotab software so trainees can navigate through the software and properly complete tasks. In addition, cross training will be provided to all occupations but especially to Technicians, Lead Technicians, Project Leaders, Lead Technicians II, and Frontline Managers/Supervisors to obtain additional certifications and opportunities for promoting within RMC.

A comprehensive training needs assessment includes an employee-performance reviews, feedback from employees, customer surveys, and periodic reviews by managers concerning industry changes such as updates in laws related to the various aspects of the services provided by RMC.

### **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 demand for services, the Company is expanding its customer base and will hire 57 new employees (Job Number 2) to meet the demand. 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 and E-Learning delivery methods. In-house subject-matter experts and vendors may be utilized to deliver training in the following:

**Commercial Skills:** Training will be offered to all occupations except Administrative Staff. Training is intended to improve upon employees' knowledge of proper techniques for working with equipment and environmental situations. Training topics include Data Recovery, Fire Recovery, and Flood Recovery.

**Computer Skills:** Training will be offered to all occupations. Training is intended to improve software skills. Training topics include Sage 100 and People Track.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on improving Company processes. Training topics include Best Practices and Decision Making.

**Hazardous Materials Skills:** Training will be offered to Frontline Managers/Supervisors, Lead Technicians, Lead Technicians II, Operations Staff, Safety Leaders, Safety/Facility Leaders, Safety Training Supervisors, and Technicians. Training will focus on proper usage and handling of hazardous materials. Training topics include Chemical Disposal.

### **Certified Safety Training**

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

### **Electronic Recordkeeping-LMS**

Staff has reviewed and approved RMC’s proposed Learning Management System (Smartsheets).

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. RMC’s annual training budget is \$310,000 for all California locations. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

The V.P. Human Resources will oversee the Contract to help ensure training-delivery success. The Company has identified its Second Generation Leadership Manager, HR Support Specialist II, and Operations Manager to enroll trainees, schedule training, and gather training rosters to upload. ETP training will be delivered by certified in-house experts and vendors. RMC has retained Training Grants Intelligence, Inc. (TGII) to manage ETP’s online systems.

### **Special Employment Training**

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, as a caveat for RESPOND projects, trainees qualify for the standard wages instead of the statewide average hourly wage, from \$41.20 per hour to \$22.66 per hour.

#### ➤ High Unemployment Area

Some trainees in Job Numbers 1 and 2 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by at least 25%. The Company’s location in San Joaquin County is in an HUA.

These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages.

However, the Company is not requesting a HUA wage modification.

**ACTIVE PROJECTS**

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

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Retained	Potential Earnings (Based on Tracked Hours) (\$ %)
ET23-0377 (Literacy)	\$113,827	6/12/2023 – 6/11/2025	101	0	\$3,197 (3%)*

\*Based on ETP Systems, this Contract was approved at the May Panel Meeting and is part of the ETP Workforce Literacy Pilot Program. RMC has 73 trainees currently enrolled. The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through June 2025.

**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 \$ %
ET20-0248 (Core)	Hayward	2/3/2020 – 2/2/2022	\$479,136	\$479,136 (100%)

**DEVELOPMENT SERVICES**

The Company retained Training Grants Intelligence Inc. (TGII) in Redding, CA to assist with development of this proposal for a flat fee of \$9,950.

**ADMINISTRATIVE SERVICES**

TGII 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Commercial Skills**

- Data Recovery
- Fire Recovery
- Flood Recovery
- Inventory
- Warehouse
- Green Powered Trucks
- IICRC Certification
- Certified Restorer
- GS-10F-153AA Certification

**Computer Skills**

- ADP Enterprise System
- Salesforce
- Sage 100
- People Track
- Xactimate
- MjobTime
- Concur
- SmartSheets
- Microsoft Office Suite, Intermediate and Advanced
- Cisco Phone System
- Human Resources Information Systems (HRIS)
- Computer Programming Applications
- Geotab

**Continuous Improvement Skills**

- Best Practices
- Business Performance/Skills Enhancement
- Communication Skills
- Decision Making
- Early Management
- Environmental Sustainability
- Focus Improvement
- Leadership Skills for Frontline Workers
- Material Improvement
- Monitoring
- Operations/Workflow
- Organizational Capability
- Problem Solving
- Process Improvement
- Production Scheduling
- Project Management

- Quality Concepts
- Strategic Planning
- Teambuilding
- Total Quality Management

**Hazardous Materials Skills**

- Asbestos
- Biohazards
- Chemical Disposal
- Lead

**Safety Skills - OSHA 10 (Certified-OSHA Instructor)**

- OSHA 10

**Safety Skills - OSHA 30 (Certified-OSHA Instructor)**

- OSHA 30



Retrainee-Job Creation  
**Training Proposal for:**  
**Keysight Technologies, Inc.**  
**Contract Number: ET24-0251**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** A. Reyes

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Placer, Santa Clara, Sonoma	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 2,884	U.S.: 5,295	Worldwide: 14,976
<u>Turnover Rate:</u>	8%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$960,000

<b>Total ETP Funding</b>
\$499,560

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills, Cont. Impr., HazMat, Mfg. Skills	250	8-200	0-60	\$1,380	\$26.86
				Weighted Avg: 60			
2	Retrainee Priority Rate Job Creation	Computer Skills, Cont. Impr., HazMat, Mfg. Skills	84	8-200	0-60	\$1,840	\$25.50
				Weighted Avg: 80			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Number 1: \$22.66 per hour in Sonoma and Placer Counties; \$24.72 per hour in Santa Clara County  
 Job Number 2 (Job Creation): \$18.54 per hour in Sonoma and Placer Counties; \$20.60 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.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Job Number 1 Retrainees		
Administrators	\$26.86 - \$48.95	50
Engineers	\$40.31 - \$59.35	50
Technicians	\$34.46 - \$56.40	150
Job Number 2 Job Creation		
Administrators	\$25.96 - \$48.95	10
Engineers	\$37.36 - \$59.35	30
Technicians	\$25.50 - \$56.40	44

**INTRODUCTION**

Founded in 2014 and headquartered in Santa Rosa, Keysight Technologies, Inc. (Keysight) ([www.keysight.com](http://www.keysight.com)) 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 fifth 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

Previous training focused on lean manufacturing processes, white belt/green belt programs, and general management and professional development courses. Under this proposal training includes electronic measurement system modeling, signal sciences, process engineering, software design and support systems, and product quality/reliability. Current staff has training and experience, but lack in specific skills in advanced product technologies that were recently developed by Keysight. Training will ensure they are able to meet Keysight's high standards. The company is also devoting significant resources to new technologies in communications, semiconductors, automotive, batteries, and mobile industries. In addition to Engineers and Technicians, Administrators will receive a combination of computer and continuous improvement skills training.

### 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 demand, the Company will hire 84 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 provided via Clas/Lab, E-Learning and CBT in the following:

**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, Blockchain Programing and Programing Languages.

**Continuous Improvement:** Training will be offered to all occupations and include quality improvement and customer relations. Topics include Leadership and 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 Restricting of Hazardous Substance and Risk Management and Waste Management.

**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 Application-Specific Test Systems + Components, Cloud Security Test and Lab Automation and Robotics.

## 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.

## Electronic Recordkeeping/LMS

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

## 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

Training will be administered under Keysight's training department which oversees the workforce training across the organization and operates under the direction of a Vice President. Keysight work directly with a third-party administrator. Additionally, the Company will have several full-time administration training staff assigned to this project to work with its third-party administrator and with ETP. Training will be delivered by in- experts and vendors as needed.

## Prior COVID Performance

Keysight had a prior ETP Contract under COVID Pilot Program with a term from 10/5/2020 to 10/4/2022. The Company was able to earn 100% of the funds (\$200,000).

## ACTIVE PROJECTS

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

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Retained	Potential Earnings (Based on Tracked Hours) (\$ %)
ET22-0177	\$494,500	11/22/2021-11/21/2023	325	0	\$494,000 (100%)

Based on ETP Systems, 50,238 reimbursable hours have been tracked for potential earnings of \$494,000 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through August 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 \$ %
ET20-0309	Santa Rosa, Roseville, Santa Clara	5/26/2020- 5/25/2022	\$460,000	\$458,997 (99%)

**DEVELOPMENT SERVICES**

Herrera & Company, located in Stockton, assisted with the 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Computer Skills**

- Advanced Desktop Productivity Applications
- Advanced eBusiness Applications
- Advanced Manufacturing Control Systems
- Advanced Manufacturing Lab Applications
- Allotrope Data Format Programming
- Blockchain Programming
- Business System Processing
- Human Resources Information Software System
- LabView Software
- Management and Manufacturing Control Systems
- Materials and Logistics Software Development
- Microsoft FLOW Application Development
- Programming Languages
- Project Management Software Tools
- Proprietary Software and Informatics
- SharePoint On-line Programming

**Continuous Improvement Skills**

- Advanced Product Quality and Reliability Techniques
- Design Tools and Practices
- Design for Excellence
- Leadership and Coaching Skills
- Quality Fundamentals/Core skills
- Problem Solving Tools
- Product Transfer/Workflow
- Project Management
- Six Sigma/Green Belt
- Team Dynamics
- Technical Presentations

**Hazardous Materials Skills**

- Restricting of Hazardous Substances
- Risk Management and Waste Management

**Manufacturing 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 (DMM)
- Dynamic Signal Analyzers, Materials Measurement
- EMI + EMC Measurements, Phase Noise, Physical Layer Test Systems
- Frequency Counter Products
- Handheld Oscilloscopes, Analyzers, Meters
- High-Speed Digitizers + Multichannel Data Acquisition Solutions
- In-circuit Test Systems
- Infoline Support Portal
- Ixia Professional Services
- Lab Automation and Robotics
- Laser Interferometers + Calibration Systems
- LCR Meters + Impedance Measurement Products
- Logic Analyzers
- MMIC Millimeter-Wave + Microwave Devices
- Monolithic Laser Combiners + Precision Optics
- Network Analyzers
- Noise Figure Analyzers + Noise Sources
- Oscilloscopes
- Parameter + Device Analyzers, Curve Tracer
- Parametric Test Solutions
- Photonic Test + Measurement Products
- Picoammeters, Electrometers
- Power Meters + Power Sensors
- Protocol Analyzers + Exercisers
- Pulse Generator Products
- PXI Products
- RF + Microwave Test Accessories
- Signal Generators (Signal Sources)
- Source Measure Units
- Spectrum Analyzers (Signal Analyzers)
- Technology Refresh Services
- Test as a Service (TaaS)
- Test Asset Management and Optimization
- Vector Signal Analyzers
- VXI Products
- Waveform and Function Generator

### **Computer-Based Training**

Trainees may receive any of the following:

#### **Computer Skills**

- Advanced Desktop Applications (2 hrs.)
- Customer Relationship Management Systems (1 hr.)
- Management and Manufacturing Control Systems (4 hrs.)

- Materials and Logistics Software Development (6 hrs.)
  - Business Intelligence (2 hr.)
  - Data Analytics (2 hr.)
  - Introduction to Logistics (1 hr.)
  - Systems Integration (1 hr.)
- Operating System Programming Language (1 hr.)
- Programming Languages (1 hr.)
- Project Management Software Tools (1 hr.)
- Single-Vendor Enterprise Resources Planning (1 hr.)

### **Continuous Improvement Skills**

- Business Excellence and Finance (6 hrs.)
  - Capital Budgeting (1 hr.)
  - Decision Making (1 hr.)
  - Financial Risk Management (1 hr.)
  - Financial Statement Analysis (1 hr.)
  - Socially Responsible Investing (1 hr.)
  - Working Capital Management (1 hr.)
- Customer Communications and Awareness (3 hrs.)
- Effective Teams (4 hrs.)
- Facilitation Skills and Mentorship (1 hr.)
- Finance and Accounting Skills (2 hrs.)
- Leadership / Coaching Skills (3 hrs.)
- Manufacturing Procedures and Protocols (2 hrs.)
- Manufacturing Quality and Reliability (1 hr.)
- Marketing Promotion and Position (2 hrs.)
- Problem Solving Tools and Techniques (4 hrs.)
- Process and Capability Mapping (1.5 hrs.)
- Process Improvement Training (3 hrs.)
- Product Knowledge and Market Validation (5 hrs.)
  - Customer Segments (1 hr.)
  - Competitive Analysis (1 hr.)
  - Sales Techniques and Strategies (1 hr.)
  - Value Proposition (2 hr.)
- Production System Procedure Review (1 hr.)
- Quality Fundamentals/Core Skills (1 hr.)
- Quality Management Systems (QMS) Procedures (1 hr.)
- Sales and Negotiation Skills (1 hr.)
- Strategic Sales Negotiation Techniques (1 hr.)
- Technical Presentations (1.5 hrs.)



Retrainee-Job Creation  
**Training Proposal for:**  
**Montage Medical Group**  
**Contract Number: ET24-0245**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** J. Fetsch

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SET HUA Medical Skills Training Job Creation Initiative	Industry Sector(s):	Services Healthcare  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Monterey	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 220	U.S.: 220	Worldwide: 220
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$914,895

<b>Total ETP Funding</b>
\$335,616

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	SET Priority Rate HUA Medical Skills Training Retrainee	Business Skills, Computer Skills, Cont. Impr., Mgmt. Skills, MS-Preceptor, MS-Didactic	127	8-200	0	\$1,472	\$21.50
				Weighted Avg: 64			
2	SET Priority Rate HUA Retrainee	Business Skills, Computer Skills, Cont. Impr., Mgmt Skills	71	8-200	0	\$1,472	\$21.00
				Weighted Avg: 64			
3	SET Job Creation Initiative Priority Rate Medical Skills Training Retrainee	Business Skills, Computer Skills, Cont. Impr., Mgmt. Skills, MS-Preceptor, MS-Didactic	20	8-200	0	\$1,472	\$21.50
				Weighted Avg: 64			
4	SET Job Creation Initiative Priority Rate Retrainee	Business Skills, Computer Skills, Cont. Impr., Mgmt Skills	10	8-200	0	\$1,472	\$21.00
				Weighted Avg: 64			

\*Post-Retention Wage is the Contractual Wage.

**Minimum Wage by County:** Job Numbers 1 & 2 (SET/Priority Industry/HUA): \$17.00 per hour in Monterey County

Job Numbers 3 & 4 (SET/Priority Industry/Job Creation): \$18.54 per hour in Monterey 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.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Clinical Care Staff	\$21.50-\$25.00	1
	\$25.01-\$79.33	11
Licensed Vocational Nurse	\$25.01-\$39.18	5
Medical Assistant	\$21.50-\$25.00	66
	\$25.01-\$39.18	15

Registered Nurse	\$61.27-\$75.35	9
Frontline Manager	\$21.50-\$25.00	2
	\$25.01-\$77.50	18
<b>Job Number 2</b>		
Care Coordination	\$22.31-\$25.00	19
	\$25.01-\$28.00	9
Administrative Staff	\$21.00-\$25.00	38
	\$25.01-\$29.06	5
<b>Job Number 3</b>		
Medical Assistant	\$21.50-\$25.00	15
Registered Nurse	\$61.27-\$75.35	3
Frontline Manager	\$21.50-\$25.00	1
	\$25.01-\$77.50	1
<b>Job Number 4</b>		
Administrative Staff	\$21.00-\$25.00	10

## **INTRODUCTION**

Founded in 2009 and headquartered in Monterey, Montage Medical Group (Montage Medical) ([www.montagehealth.org](http://www.montagehealth.org)) is a subsidiary of Montage Health. Montage Medical is a health care provider emphasizing in prevention and wellness that provides a variety of hard to find medical specialists for instance Cardiovascular and Thoracic Surgery, Neurology, and Interventional Cardiology. The Company has nine locations in the Monterey County in Carmel, Marina and Monterey. Training will be conducted at Montage Medical's headquarters and facilities throughout Monterey County. This is Montage Medical's first ETP Contract.

### **Veterans Program**

Although there is no Veterans component in this project, Montage Medical values the Veteran work force and encourages all Veterans to apply through standard personnel recruitment efforts.

## **PROJECT DETAILS**

Montage Medical has a training plan in place that focuses on increasing the skills of recently hired employees, training in specialized healthcare fields, and updating skills on healthcare software. Montage Medical has developed a training curriculum, Jumpstart Academy, which is targeted towards workers new to the healthcare field. The training program includes transitioning to the healthcare workforce and how to digest, navigate and grow from its unique challenges. The curriculum also includes specific training for specialized fields. This training offers knowledge that is valuable in the job market. Lastly, Montage Medical will train healthcare staff in Epic Healthcare Records software. Administrative Staff will also train on Hyland OnBase software that is used for medical records scanning and processing.

### **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.

Montage Medical is expanding to meet the needs of the Monterey Peninsula, and recently opened up an interventional cardiology and electrophysiology facility and plan to open two more medical office buildings within the next two years. The Company will hire 30 new employees (Job Numbers 3 & 4) to accommodate this growth. 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:

**Business Skills:** Training will be offered to all occupations and include Checking in and Reassessments, Jumpstart Academy and Provider Personalization training.

**Computer Skills:** Training will be offered to all occupations and focus on medical software skills. Training includes Epic Healthcare Records Basics, Hyland OnBase Software and Provider Dragon Training.

**Continuous Improvement:** Training will be offered to all occupations and focus on upgrading knowledge and skills in day-to-day tasks. Training includes Strategic Thinking, Pre-Charting and Rooming, Referrals and Diagnostics and Scheduling Basics.

**Management Skills:** This training will be offered to Front-Line Managers and focus on managing clinics. Training will include Ambulatory Clinic Manager Training.

**Medical Skills (Didactic):** This training will be offered to Clinical Care Staff, Licensed Vocational Nurse, Medical Assistant, Registered Nurse and Front Line Manager. These trainees will receive training that is pertinent to their main job functions. Training topics include Bloodborne Pathogens, Medication Management, Needle and Sharps Safety, and Collaborative Care Services.

**Medical Skills (Preceptor):** This training will be offered to Clinical Care Staff, Licensed Vocational Nurse, Medical Assistant, Registered Nurse and Front Line Manager. Training topics include Common Conditions and Symptoms, Specialty Specific Workflows, Sterile Technique, and Commonly Ordered Tests and Procedures. Training will be provided at a lower ratio (1:10) to ensure trainees receive the attention to detail while in the field. The trainees will observe a qualified mentor or other practitioner in a productive work environment then the trainee will perform the skills under the trainer's close supervision.

## Special Employment Training

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

### ➤ Wage Modifications

The trainees in Job Numbers 1-4 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. The Company's locations in Monterey County are in an HUA.

These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Montage Health is requesting a wage modification from \$30.90 per hour to \$21.50 per hour in Job Number 1 and from \$30.90 per hour to \$21.00 per hour in Job Number 2.

Approximately 85 Clinical Care Staff, Licensed Vocational Nurse, Medical Assistant and Front-Line Manager in Job Number 1; and 76 Care Coordination and Administrative Staff in Job Number 2 will need the wage modification.

The Company is not requesting a HUA wage modification for Job Numbers 3 & 4.

### **Commitment to Training**

Montage Medical's training budget is \$38,274 per facility annually for new hire orientations, company policies, basic training, staff development 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**

The Executive Director will provide oversight and set program direction. Two fulltime certified trainers will oversee training and be responsible for scheduling, collecting and submitting the training rosters. Rosters will be collected and stored at the headquarters. Training will be provided by in-house experts and vendors as needed. The Company has also retained an administrative subcontractor to assist with project administration.

### **DEVELOPMENT SERVICES**

Dunton Consulting, Inc. in Monterey assisted with development of this proposal at no cost.

### **ADMINISTRATIVE SERVICES**

Dunton Consulting, Inc. will also perform administrative services for a fee of not to exceed 13% of payment earned.

### **TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Call Center Policies, Cisco Finesse and Efficiency Tips
- Cash Handling Policies and Procedures
- Checking in and Reassessments
- Constructive Feedback: Summarizing, Focus on Observations
- Jumpstart Academy
- Provider Personalization Training
- Provider Training Specialty: Primary Care
- Scanning Basics
- Teaching and Modelling: See One, Do One, Teach One
- Worklists, Appointment Request and Patient Work Queues

**Computer Skills**

- Epic Healthcare Records
- Hyland OnBase Software
- InBasket
- Provider Dragon Training
- Reporting in EPIC 100 Training

**Continuous Improvement Skills**

- Coaching for Performance
- Effective Meetings at Work
- Influencing Across and Up
- Strategic Thinking
- Working with Multiple Generations
- Check-In/Out and AVS Documents
- Pre-Charting and Rooming
- Referrals and Diagnostics
- Registration and Insurance Basics
- Scheduling Basics

**Management Skills (Managers Only)**

- Ambulatory Clinic Manager Training

**Medical Skills (Didactic)**

- ADD Airborne & Droplet Disease Transmission
- Advanced Care Planning Training
- Bloodborne Pathogens
- Chemical Safety
- Collaborative Care Services
- Confidentiality and HIPAA Compliance
- Electrical Safety
- General Safety Skills

- Hazardous Communication and Chemical Safety
- Lock/Tag Out
- Medication Management
- Needle and Sharps Safety
- Obstetrics Medical Assistant Training
- Reporting to Work & Back Safety
- Surgery Scheduler Training

**Medical Skills (Preceptor)**

- Common Conditions and Symptoms
- Commonly Ordered Tests and Procedures
- Human Body System Review
- InBasket Clinical Training
- Patient Flow
- Pre-Visit Planning
- Specialty Specific Workflows
- Standard Orders
- Sterile Technique
- Urgent Symptoms



Retrainee-Job Creation

**Training Proposal for:**

**Oregon Pacific Building Products (Calif.), Inc.**

**Contract Number: ET24-0235**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Wholesale Trade/Distribution  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento, San Bernardino	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 220	U.S.:924	Worldwide: 924
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	2%		

**FUNDING DETAIL**

<b>In-Kind Contribution</b>
\$500,000

<b>Total ETP Funding</b>
\$438,840

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, HazMat	211	8-200	0	\$1,380	\$22.66
				Weighted Avg: 60			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Commercial Skills Computer Skills, HazMat,	107	8-200	0	\$1,380	\$20.00
				Weighted Avg: 60			

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

**Minimum Wage by County: Job Number 1 (Retrainee):** \$22.66 per hour for Sacramento and San Bernardino County.

**Job Number 2 (Job Creation):** \$18.54 per hour for Sacramento and San Bernardino County.

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

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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee)</b>		
Admin Staff	\$20.16 - \$25.00	6
	\$25.01 - \$42.00	2
Door Shop Staff	\$20.16 - \$25.00	36
	\$25.01 - \$27.00	10
Driver	\$20.16 - \$25.00	20
	\$25.01 - \$28.00	8
Lead	\$21.00 - \$25.00	10
	\$25.01 - \$30.00	5
Paint Booth Staff	\$20.16 - \$25.00	10
Sales Staff	\$20.16 - \$25.00	21
Service Staff	\$20.16 - \$25.00	18
Warehouse Staff	\$20.16 - \$25.00	46
	\$25.01 - \$27.00	19
<b>Job Number 2</b>		
Admin Staff	\$20.00 - \$25.00	5
Door Shop Staff	\$20.00 - \$25.00	28
Driver	\$20.00 - \$25.00	12
Lead	\$21.00 - \$25.00	5
Paint Booth Staff	\$20.00 - \$25.00	4
Sales Staff	\$20.00 - \$25.00	7
Service Staff	\$20.00 - \$25.00	16
Warehouse Staff	\$20.00 - \$25.00	30

## **INTRODUCTION**

Founded in 1977 and headquartered in Wilsonville, OR, Oregon Pacific Building Products (Calif.), Inc. (OrePac) ([www.orepac.com](http://www.orepac.com)) is a family-owned and operated business that manufactures and distributes building products such as doors, decking, boards, millwork, and weatherization systems to building product retailers, construction industry builders, and building subcontractors in the western United States. Training under this proposal will be conducted for trainees at its Sacramento and Ontario locations. This will be OrePac's second ETP-funded project; the second in the last five years.

### **Veterans Program**

The Company does not have a Veteran recruiting program; however, they actively support resumes with a military background.

## **PROJECT DETAILS**

OrePac has experienced continuous growth in business due to increased sales from new products including screen and security doors. In the previous project, OrePac focused its training on increasing product quality by investing in new equipment. Under this project, the Company has implemented a Leadership Development program focused on revamping its onboarding process and trainings to address internal growth within the Company. OrePac also invested over \$50k on a new Learning Management System. Training will be companywide and will allow the Company to improve its internal processes and procedures.

OrePac will also continue its training efforts on equipment operation, inventory management, work quality and safety. Training will include learning internal processes and procedures from one of the largest door manufacturers on the west coast. Product knowledge training is ongoing. Although there are training topics included in the curriculum that are similar to topics from the previous Contract, trainees will not receive duplicate training.

### **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.

OrePac anticipates a 25% growth in business in the next few years and will be hiring 107 new employees (Job Number 2) to address the growth. 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 and E-Learning in the following:

**Business Skills:** Training will be offered to all occupations to increase customer satisfaction. Training topics include Customer Service, Problem Solving & Decision Making, and Communication Skills.

**Commercial Skills:** Training will be offered to Door Shop Staff, Leads, Paint Booth Staff, Service Staff, and Warehouse Staff. Training will ensure staff are properly trained on equipment operation. Training topics include Door Jamb Machinery, Door Templates, and Sweeper Operations, among other topics.

**Computer Skills:** Training will be offered to all occupations. Training will ensure staff are competent on the Company's internal software systems. Training topics include BisTrack, DuPont DODGE, and Warehouse Management Systems.

## **Certified Safety Training**

Hazardous Materials (HAZMAT). This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, all occupations may 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.

## **Commitment to Training**

OrePac invests \$250,000 annually on training for all its California locations. ETP funds will not displace the existing financial commitment to training. Training include onboarding, safety training, and orientation. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

OrePac’s Training and Development Manager will be responsible for overseeing all aspects of the training project with the assistance of the Training and Development Coordinator. The Company has four dedicated trainers for each of its locations and may utilize vendors when necessary. Additionally, the Company has engaged the services of an administrative subcontractor to assist with successfully completing this project.

## **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 \$ %
ET19-0424	Sacramento, Ontario	3/1/19 - 2/28/21	\$152,776	\$152,776 (100%)

## **DEVELOPMENT SERVICES**

Propel Consulting Group in El Dorado Hills assisted with development of this proposal for a flat fee of \$15,000.

## **ADMINISTRATIVE SERVICES**

Propel Consulting Group 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Business Performance
- Communication Skills
- Customer Service
- Financial Reporting
- Leadership vs Management
- Overcoming Objections
- Problem Solving & Decision Making
- Product Knowledge
- Sales Skills
- Tough Conversations

**Commercial Skills**

- Door Jamb Machinery
- Door Production Machinery
- Door Templates
- Electric Cart Operation
- Equipment Operation
- Finishing Techniques
- Forklift Training
- Hand Tool Operations
- Industrial Saws
- Inventory Control
- Packaging Operations
- Sweeper Operations
- Trash Compactor Operations
- Warehousing Strategies

**Computer Skills**

- BisTrack
- DuPont DODGE
- Intermediate/Advanced MS Office
- Marketplace E-Commerce
- Payroll Systems – ADP
- SharePoint
- Warehouse Management Systems

**Hazardous Materials Skills**

- Hazardous Materials Cleaning
- Hazardous Materials Disposal
- Hazardous Materials Handling
- Lockout/Tagout



## Training Proposal for:

**Studio Arts, Ltd.**

**Contract Number: ET24-0232**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

### PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100	Industry Sector(s):	MEC Multimedia/Entertainment  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Motion Picture Editors Guild IATSE Local 700 , Art Directors Guild IATSE Local 800, The Animation Guild IATSE Local 839 and Script Supervisors/Continuity, Coordinators, Accounts & Allied Production Specialists Guild IATSE Local 871		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

### FUNDING DETAIL

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$338,238		\$23,256 8%		\$361,494

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
-----------------------	-----------------------------------	----------

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills	342	8-200	0	\$1,057	\$22.66
				Weighted Avg: 43			

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

**Minimum Wage by County:** \$24.72 per hour for Alameda, Marin, San Mateo, Santa Clara and San Francisco counties; \$23.59 per hour for Contra Costa County; and \$22.66 per hour for all other Counties.

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

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

Up to \$1.72 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Animator	\$25.00 - \$50.00	25
Art Department Coordinator	\$23.00 - \$25.00	20
	\$25.01 - \$45.00	25
Art Director	\$35.00 - \$75.00	30
Assistant Art Director	\$25.00 - \$50.00	27
Compositor	\$23.00 - \$25.00	5
	\$25.01 - \$40.00	10
Computer Graphics Animator	\$35.00 - \$50.00	30
Computer Graphics Modeler	\$35.00 - \$55.00	25
Digital Painter	\$25.00 - \$40.00	10
Graphic Designer	\$25.00 - \$60.00	20
Illustrator	\$25.00 - \$75.00	20
Production Technical Director	\$35.00 - \$55.00	10
Set Designer	\$32.00 - \$75.00	25
Technical Director	\$25.00 - \$60.00	10
Visual Developer	\$37.00 - \$56.00	20
Visual Effects Artist	\$25.00 - \$60.00	30

**INTRODUCTION**

Founded in 2001 and located in Los Angeles, Studio Arts, Ltd. (Studio Arts) ([www.studioarts.com](http://www.studioarts.com)) is a private training provider of high-tech, software and hardware workforce training to the motion picture, television and post-production industries. The school provides training in motion picture and television production, visual effects, production design, mobile and educational entertainment, and online gaming, as well as set design

and prop-making for theatrical, theme parks, and model-making companies throughout California. This will be Studio Arts' sixth ETP proposal, and the fourth in the last five years.

Studio Arts last requested training funds at the August 2021 Panel meeting in the amount of \$597,100. However, due to Panel concerns regarding performance (reported monitoring issues, prior audits, and a need to further expand on the curriculum), the funding proposal was denied by the Panel (See Prior Contracts and Reported Audits).

### **ETP Safeguards for Studio Arts**

As a result of prior ETP Monitoring and Audit findings, ETP Field/Fiscal/Audit staff met with Studio Arts and recommended the following Contract safeguards:

1. Individual (one on one) Start-Up in addition to the Group Start-Up Meeting (GSUM) to provide personalized attention and tailored guidance for ETP requirements.
2. Increased monitoring: 30 days after the start of Contract term and every 6 months to provide extra support in record review to address and resolve any concerns or discrepancies that may arise. This proactive approach helps prevent any possible issues by identifying and rectifying them promptly during the term of the agreement.
3. Funding right-sized to no more than 50% of the current funding cap with the goal of minimizing any potential future liabilities.
4. Include in the Terms of the ETP Contract the following Conditions:
  - Invoice - For credit only. Payments will be disbursed once the trainee's hours are deemed EARNED. This process is in place to prevent possible overpayment and to ensure compliance.
  - Close out contract by ETP fiscal and must be considered EARNED before returning for a future contract in order to maintain earnings accuracy and transparency before returning to ETP for future funding.
  - Use "actual hours" start and end times from ZOOM usage reports to prevent duplication and ensure accurate tracking of hours spent training. Course schedule hours will not be reported for ETP tracking purposes.
  - Paper-based rosters permitted exclusively for in-person, hands-on equipment sessions, which constitute less than 10% of the total allocated hours.
  - Maintain unaltered ZOOM.csv usage reports and corresponding ETP-uploaded Excel files to ensure the accuracy of the data. Modifying usage reports could compromise data integrity, and by keeping them unchanged, the reliability of the information is preserved.

Studio Arts has agreed to all the protective measures and contractual conditions specified above.

### **Veterans Program**

Although there is no Veterans training component in this proposal, participating employers actively hire Veterans, and Veterans are included in the trainee population.

### **Union Support**

Included in the core group of employers are trainees represented by four collective bargaining units. ETP has received letters of support from these bargaining units (See Page 1).

## **PROJECT DETAILS**

The entertainment industry is facing ongoing new technology challenges and a critical shift in business resulting from the COVID-19 pandemic. More companies are becoming web-based, using the internet and associated mobile media delivery systems to provide consumer content. As such, most productions now

have shorter production times and are often developed, shot and assembled at multiple locations including remote production by artists. Many companies are also shifting to providing content thru Virtual Production and Virtual Reality, which involves creating virtual scenes versus physical sets, backgrounds and environments. Virtual Production and Virtual Reality requires the use of games or environmental “engines” such as Unreal Engine and Unity to perform and manage these tasks. Artists and technicians throughout the industry are currently using these engines to do their jobs, from pre-visualization to actual production to post-production. These new technologies are becoming an increasingly important source of entertainment, bringing new standards and complexities to productions.

As a result, employer demand has been increasing and Studio Arts is seeking to update and upgrade employee skills to keep up with new technology and establish new ways to operate businesses. In addition, the industry is extremely competitive, with increasing local and new out-of-state competitors. To remain competitive, participating employers must update employee skills to keep up with new technology and establish new ways to operate businesses. ETP-funded training will provide participating employers the opportunity to sustain their competitiveness, provide workers with the necessary technical skills required to integrate new services and products, create new job opportunities, remain current with rapidly changing technology, and adapt to the new business environment resulting from the COVID-19 pandemic. Training will equip workers with the most marketable skills available in a highly competitive and technically sophisticated industry. Studio Arts focuses 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.

## **Employer Demand**

The curriculum has been designed to meet industry and employer-specific needs of production companies, guilds, and unions in the motion picture, television, and post-production industries. Studio Arts holds trade advisory meetings attended by visiting company representatives and industry experts who help develop the curriculum to address immediate, short-, and long-term needs. Email surveys, interviews, and consultations are held with production management and prospective trainees to determine course content. Studio Arts routinely employs assessment forms completed by students at the end of every class, and maintains close relationships with employers, unions, and trade organizations to ensure that training is relevant and effective.

The core group of participating employers consist of 11 large and 18 small production businesses, consistent with the Panel’s priorities. This core group of employers represents at least 80% 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. Some core employers may have participated in at least one of Studio Art’s previous Contracts, and several topics from the proposed Curriculum are similar from prior ETP Contracts. However, course content has been updated and no trainees who participated in prior ETP projects will receive duplicative training in this proposed Contract. Studio Arts anticipates 85% of training will be conducted at its facilities in Los Angeles, and the remaining 15% will be at participating employer locations.

## **Training Plan**

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

**Computer Skills:** This training will be offered to all occupations. Training will focus on the latest in techniques, software applications and production workflow trends. Trainees will learn various aspects of animation, computer graphics, digital television, feature film production, visual effects and post-production focusing specifically on digital art and technology as it relates to character design and animation, set design and construction, motion capture, green/blue screen technology, digital storyboarding, lighting, graphics, and special effects.

## **Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

## **Retention Modification**

Under standard Panel retention requirements, trainees must be employed with one employer at least 35 hours a week for at least 90 days. However, these are employees in the entertainment industry hired for short-term jobs; therefore, retention may also be satisfied by employment of at least 500 hours within 272 days, with more than one employer.

## **Commitment to Training**

Core participating employers have stated that they occasionally provide employer orientation and some basic training on their own, but lack the necessary operational overhead, space, equipment, software, and expert instructors to effectively train their workers.

Employers have shown their ongoing commitment to training by contributing staff time to organize training, providing on-the-job reinforcement, providing technical upgrades, and allowing some trainees to take classes during work time. Studio Arts continually endeavors to have employers increase their own financial commitment to continued training efforts.

ETP funds will not displace the existing financial commitment to training.

### **➤ Training Infrastructure**

Training is scheduled to begin upon Panel approval. The Company's President will oversee the project with two staff members (General Manager and E-Learning Specialist) to coordinate administration responsibilities including marketing, recruitment, assessment, scheduling training, enrollment, recording, tracking, securing rosters, verifying training and retention completion and ensuring compliance with all ETP requirements. In addition, Studio Arts has obtained the services of a third party administrator.

## **Marketing and Support Costs**

Studio Arts markets its training to employers via informational meetings and seminars, conferences, trade magazine advertising, posters, website, social media and mailing brochures, as well as the internet and e-mail. The Company has established relationships with Workforce Investment Boards, Human Resources departments and staff and collaborative networks of businesses.

There are currently three dedicated staff members who conduct employer marketing, recruitment, and assessment and provide project administration and tracking. Studio Arts recruits from a very large labor market. Due to rapid technological changes, it must spend a significant amount of time matching employer needs to the curriculum. Studio Arts is requesting 8% support for employer recruitment and needs assessments activities that will be ongoing throughout the term of the Contract. Staff recommends an 8% support costs.

## **Professional Employer Organization**

Studio Arts represents that a participating employer, Bento Box currently uses the services of Professional Employer Organizations (PEO), Entertainment Partners respectively. However, funding eligibility is based on the Contractor's and Participating Employer's qualifications, and Studio Arts will be held solely responsible for performance under the ETP Contract. This Proposal has been reviewed by ETP staff to ensure compliance with all applicable guidelines. Studio Arts has been informed about the duty to make

certain PEO representations in the ETP Contract; including, without limitation, that the applicable PEO Agreement clearly establishes the PEO as the party responsible for withholding and reporting Unemployment Insurance taxes and that Bento Box retains the exclusive right to direct and control the work performed by trainees and set the amount of their wages.

Studio Arts will advise ETP of any additional PE's added to the Contract after approval who are using a PEO. Additionally, Studio Arts agrees to provide ETP with any information requested to ensure eligibility prior to the start of the PE's ETP funded training.

### **Trainer Qualifications**

Training will be provided by Studio Arts faculty who have at least ten years of experience and are considered subject matter experts. Trainers have advanced educational degrees and/or are certified to teach the software/systems outlined in the curriculum.

### **Training Agency Certification**

Training agency eligibility requires certification by an independent third party, as required for the type of school and course of study. Most schools must also be licensed by the Bureau of Private Postsecondary Education (BPPE).

Studio Arts is eligible as a BPPE licensure valid until February 14, 2027.

### **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.

### **PRIOR CONTRACTS**

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

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET20-0233	Statewide	12/14/19 - 12/13/21	\$749,316	\$649,687 (86%)
**ET18-0158	Los Angeles, Orange	01/25/18 - 01/24/20	\$1,199,899	\$1,022,876 (85%)
ET17-0405	Los Angeles, Orange	01/28/17 - 01/27/19	\$899,712	\$819,564 (91%)

\*ET20-0233: As a result of findings during the term of the Contract, Studio Arts agreed to ETP's request for a 100% internal audit of training documentation (Contractor internal review of its own records) where ZOOM was used as the training method. To assist them with its internal audit of its records, Studio Arts procured the services of a third party contractor. Their internal audit resulted in its removal of training hours previously reported to ETP for reimbursement. Consequently, its potential earnings, initially reported as \$684,620 (91% of the encumbered total \$749,316), decreased to \$649,687 (86%). Following the completion of Studio Arts internal audit of its records in December 2021 ETP staff conducted a random sample review of training records for 20 trainees (3% of trainees placed).

\*\* ET18-0158: During the term of the Contract, ETP Monitoring staff discovered discrepancies between training records and hours reported to ETP. As a result, ETP asked Studio Arts to conduct a 100% internal review of its records to ensure training was documented per ETPs standards, and information reported in the ETP system was accurate.

**REPORTED AUDITS**

ET18-0158 – (January 25, 2023) – unearned costs = \$11,961

The disallowed costs were a result of the following Trainee information:

- Trainees were employed in an occupation not included in the Contract,
- Ineligible training hours due to concurrent enrollment,
- Ineligible training hours,
- Did not meet minimum wage requirements,
- Did not meet full-time employment requirement,
- Unsupported training hours, and
- Trainee wage rates were inaccurately reported to ETP.

On February 15, 2023 ETP received all unearned funds and interest in the amount for \$13,049.39 from Studio Arts.

ET16-0151 (September 9, 2020) – unearned costs = \$44,635

The disallowed costs were a result of the following Trainee information:

- Ineligible training hours due to concurrent enrollment,
- Ineligible for enrollment in ETP training,
- Did not meet minimum wage requirements, and
- Did not meet post-training retention requirements.
- Ineligible training hours.

All unearned costs have been satisfied and off-set from subsequent contracts to ET16-0151 and ET18-0158.

ET13-0359 (March 30, 2017) – unearned costs = \$6,186

The disallowed costs were a result of the following Trainee information:

- Did not meet post-training retention requirements,
- Unsupported and/or ineligible training hours, and
- Wage rates were inaccurately reported to ETP.

All unearned costs have been satisfied from Studio Arts.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

Studio Arts has retained Robert Sanger Consulting in Sacramento 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: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Computer Skills**

- After Effects
- Blender
- CG Modeling
- Character Animation (CG)
- Character Development
- Cinema 4D
- Compositing and VFX
- DaVinci Resolve
- Digital Design and Illustration
- Digital Set Design
- Digital Sketching
- Digital Storyboarding
- ICFX (In Camera Visual Effects)
- Illustrator
- Marvelous Designer
- MetaHuman
- Motion Capture
- Nuke
- Photoshop
- Python
- Script/Story Development
- Sequencer
- Stage Ops
- Substance Painter
- Unreal Engine
- Unreal Engine Blueprint
- Unreal Connectors
- Virtual Production
- ZBrush

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: Studio Arts, Ltd.

CCG No.: ET24-0232

Reference No: 24-0169

Page 1 of 7

ALPHABETIZE BY COMPANY NAME

Company: Age of Learning Inc.

Priority Industry? ☒ Yes ☐ No

Address: 101 N. Brand Blvd.

City, State, Zip: Glendale, CA 91502

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Contract: 33

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 464

Total # of full-time company employees in California: 332

Company: AV Squad

Priority Industry? ☒ Yes ☐ No

Address: 101 S La Brea Ave.

City, State, Zip: Los Angeles, CA 90036

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Contract: 15

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 155

Total # of full-time company employees in California: 151

Company: Bento Box Ent.

Priority Industry? ☒ Yes ☐ No

Address: 5161 Lankershim Blvd.

City, State, Zip: North Hollywood, CA 91601

Collective Bargaining Agreement(s): IATSE Locals 839, 700

Estimated # of employees to be retrained under this Contract: 49

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 493

Total # of full-time company employees in California: 493

Company: Cosa VFX, Inc.

Priority Industry? ☒ Yes ☐ No

Address: 5543 Riverton Ave.

City, State, Zip: North Hollywood, CA 91601

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 160

Total # of full-time company employees in California: 61

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: Studio Arts, Ltd.

CCG No.: ET24-0232

Reference No: 24-0169

Page 2 of 7

ALPHABETIZE BY COMPANY NAME

Company: Creative Character Engineering Inc.

Priority Industry? ☒ Yes ☐ No

Address: 11050 Randall Street

City, State, Zip: Sun Valley, CA 91352

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 51

Total # of full-time company employees in California: 51

Company: D Before E Inc.

Priority Industry? ☒ Yes ☐ No

Address: 13351 Riverside Dr.

City, State, Zip: Sherman Oaks, CA 91423

Collective Bargaining Agreement(s): IATSE Local 800

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 3

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

Company: DNEG ReDefine

Priority Industry? ☒ Yes ☐ No

Address: 2255 Ontario St.

City, State, Zip: Burbank, CA 91594

Collective Bargaining Agreement(s): None

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

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 9900

Total # of full-time company employees in California: 88

Company: DeRouchey Urethane Creations Inc.

Priority Industry? ☒ Yes ☐ No

Address: 11035 Sutter Ave

City, State, Zip: Pacoima, CA 91331

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 17

Total # of full-time company employees in California: 14

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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

Contractor's Name: Studio Arts, Ltd.

CCG No.: ET24-0232

Reference No: 24-0169

Page 3 of 7

ALPHABETIZE BY COMPANY NAME

Company: Framestore

Priority Industry? ☒ Yes ☐ No

Address: 8616 National Blvd.

City, State, Zip: Culver City, CA 90232

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Contract: 12

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 3,030

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

Company: Gentle Giant Studios

Priority Industry? ☒ Yes ☐ No

Address: 7511 N. San Fernando Blvd.

City, State, Zip: Burbank, CA 91505

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Ingenuity Studios

Priority Industry? ☒ Yes ☐ No

Address: 941 N. Highland Ave

City, State, Zip: Hollywood, CA 90038

Collective Bargaining Agreement(s): None

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

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 289

Total # of full-time company employees in California: 103

Company: Jakks Pacific Inc.

Priority Industry? ☒ Yes ☐ No

Address: 2951 28th St.

City, State, Zip: Santa Monica, CA 90405

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Contract: 25

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 640

Total # of full-time company employees in California: 250

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: Studio Arts, Ltd.

CCG No.: ET24-0232

Reference No: 24-0169

Page 4 of 7

ALPHABETIZE BY COMPANY NAME

Company: Khaos Digital, LLC

Priority Industry? ☒ Yes ☐ No

Address: 6007 Waring Ave

City, State, Zip: Los Angeles, CA 90038

Collective Bargaining Agreement(s): IATSE Locals 700, 800

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 11

Total # of full-time company employees in California: 9

Company: KNB EFX Group Inc.

Priority Industry? ☒ Yes ☐ No

Address: 3359 COY Drive

City, State, Zip: Sherman Oaks, CA 91423

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 50

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

Company: Laundry Design, LLC

Priority Industry? ☒ Yes ☐ No

Address: 4079A Redwood Ave.

City, State, Zip: Los Angeles, CA 90066

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 32

Total # of full-time company employees in California: 27

Company: Mattel, Inc.

Priority Industry? ☒ Yes ☐ No

Address: 333 Continental Blvd

City, State, Zip: El Segundo, CA 90245

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Contract: 35

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 36,000

Total # of full-time company employees in California: 11,000

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: Studio Arts, Ltd.

CCG No.: ET24-0232

Reference No: 24-0169

Page 5 of 7

ALPHABETIZE BY COMPANY NAME

Company: MGA Entertainment

Priority Industry? ☒ Yes ☐ No

Address: 220 Winnetka Ave.

City, State, Zip: Chatsworth, CA 91311

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Contract: 48

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 1,300

Total # of full-time company employees in California: 420

Company: Mural Makers Inc.

Priority Industry? ☒ Yes ☐ No

Address: PO Box 1264

City, State, Zip: Duarte, CA 91009

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 6

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

Company: Pixwel LLC

Priority Industry? ☒ Yes ☐ No

Address: 5340 Cangas Dr

City, State, Zip: Calabasas, CA 91301

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 24

Total # of full-time company employees in California: 22

Company: Pretty In Plastic Inc.

Priority Industry? ☒ Yes ☐ No

Address: 6818 Vineland Ave.

City, State, Zip: Los Angeles, CA 91605

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 4

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

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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

Contractor's Name: Studio Arts, Ltd.

CCG No.: ET24-0232

Reference No: 24-0169

Page 6 of 7

ALPHABETIZE BY COMPANY NAME

Company: Proof Inc.

Priority Industry? ☒ Yes ☐ No

Address: 5150 Wilshire Blvd

City, State, Zip: Los Angeles, CA 90036

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 40

Total # of full-time company employees in California: 40

Company: Ranker, Inc.

Priority Industry? ☒ Yes ☐ No

Address: 6420 Wilshire Blvd, Suite 1800

City, State, Zip: Los Angeles, CA. 90048

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 129

Total # of full-time company employees in California: 93

Company: Renegade Animation Inc.

Priority Industry? ☒ Yes ☐ No

Address: 2087 Redcliff Street

City, State, Zip: Los Angeles, CA 90039

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 14

Total # of full-time company employees in California: 14

Company: Reveal Studio

Priority Industry? ☒ Yes ☐ No

Address: 1426 Flower Street

City, State, Zip: Glendale, CA 91201

Collective Bargaining Agreement(s): None

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 10

Total # of full-time company employees in California: 10

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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

Contractor's Name: Studio Arts, Ltd.

CCG No.: ET24-0232

Reference No: 24-0169

Page 7 of 7

ALPHABETIZE BY COMPANY NAME

Company: ShadowMachine, LLC

Priority Industry? ☒ Yes ☐ No

Address: 360 N. La Cienega Blvd.

City, State, Zip: Los Angeles, CA 90048

Collective Bargaining Agreement(s): IATSE Locals 839, 700

Estimated # of employees to be retrained under this Contract: 10

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 150

Total # of full-time company employees in California: 100

Company: Sideshow Collectibles

Priority Industry? ☒ Yes ☐ No

Address: 2630 Conejo Spectrum St

City, State, Zip: Thousand Oaks, CA 91320

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Contract: 17

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 184

Total # of full-time company employees in California: 165

Company: Spectral Motion, Inc.

Priority Industry? ☒ Yes ☐ No

Address: 1849 Dana St.

City, State, Zip: Glendale, CA 91202

Collective Bargaining Agreement(s): IATSE Local 700

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 40

Total # of full-time company employees in California: 40

Company: Titmouse

Priority Industry? ☒ Yes ☐ No

Address: 2835 N Naomi St

City, State, Zip: Burbank, CA 91504

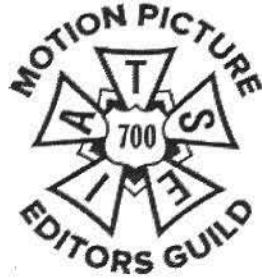
Collective Bargaining Agreement(s): IATSE Locals 839, 700

Estimated # of employees to be retrained under this Contract: 25

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 280

Total # of full-time company employees in California: 280



June 1, 2023

Employment Training Panel  
1100 J Street  
Sacramento, CA 95814

Dear Panel Members,

We understand Studio Arts 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 is 20, and will include Animation Editors, Apprentice Editors, Assistant Editors, Colorists, Editors, Story Analysts and Technical Directors.

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,

Jim Turner  
Education & Training Coordinator  
Motion Picture Editors Guild, Local 700 IATSE



ART DIRECTORS GUILD

Art Directors Guild IATSE Local 800  
11969 Ventura Blvd, Second Floor  
Studio City, CA 91604

May 11, 2023

Employment Training Panel  
1100 J Street  
Sacramento, CA 95814

Dear Panel Members,

We understand Studio Arts 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 is 20, and will include Art Directors, Assistant Art Director, Illustrators, Set Designers, Production Designers, Graphic Designers and other, represented members.

### Exhibit E

The Union with respective Local(s) has received a Notice of Intent to train Collective Bargaining agreement represented workers. In accordance with EPT 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,

Chuck Parker  
National Executive Director  
IATSE Local 800, Art Directors Guild



May 11, 2023

Employment Training Panel  
1100 J Street  
Sacramento, CA 95814

Dear Panel Members,

We understand Studio Arts 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 is 75 and that number includes Animators, Assistant Animators, Storyboard Artists and Revisionists, CG Animators, Sheet Timers, Background Artists and others represented by our local.

## Exhibit E

The Local Union 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,

Steve Kaplan  
Business Representative



IATSE LOCAL 839

1105 North Hollywood Way  
Burbank, CA 91505-2528  
T 818 845.7500 F 818 845.0300  
[www.animationguild.org](http://www.animationguild.org)



**IATSE LOCAL 871**

Script Supervisors/Continuity, Coordinators,  
Accountants & Allied Production Specialists Guild

4011 W. Magnolia Blvd., Burbank, CA 91505-2833

Tel: (818) 509-7871 • Fax: (818) 506-1555  
office@ialocal871.org • www.ialocal871.org

May 10, 2023

Employment Training Panel  
1100 J Street  
Sacramento, CA 95814

Dear Panel Members,

We understand Studio Arts 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 is 20, and will include Art Department Coordinators, Assistant Production Coordinators, Continuity Coordinators, Production Coordinators, Script Supervisors, and other represented members.

### **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 information regarding the proposed training, the impacted employee population, the labor organization's 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 or the training plan approved by the Panel are between the Contractor and the Union as a condition of continued support.

Sincerely,

Patric Abaravich  
Business Representative  
IATSE Local 871



## RETRAINEE-JOB CREATION

Training Proposal for:

**SOMA AEC, Inc. dba Oxman College**

**Contract Number: ET24-0106**

**Panel Meeting of:** October 27, 2023

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

**Analyst:** R. Jackson

### PROJECT PROFILE

Contract Attributes:	SB <100 Job Creation Initiative Priority Rate HUA Medical Skills Training SET Retrainee	Industry Sector(s):	MEC Healthcare Information / Multi Media  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo, San Francisco, Alameda, Marin, Contra Costa, Santa Clara, Sacramento, and Monterey	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤0%		

### FUNDING DETAIL

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$701,040		\$48,768 8%		\$749,808

In-Kind Contribution:	50% of Total ETP Funding Required	\$750,000
-----------------------	-----------------------------------	-----------

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee HUA Medical Skills Training Priority Rate SET	Continuous Improvement, Medical Skills (Didactic & Preceptor)	40	8–200	0	\$3,936	\$19.00
				Weighted Avg: 160			
2	Retrainee Priority Rate	Computer Skills	20	8–200	0	\$2,460	\$22.66
				Weighted Avg: 100			
3	Retrainee Medical Skills Training Priority Rate SET	Continuous Improvement, Medical Skills (Didactic & Preceptor)	20	8–200	0	\$3,936	\$30.90
				Weighted Avg: 160			
4	Retrainee Job Creation Initiative Medical Skills Training Priority Rate SET	Continuous Improvement, Medical Skills (Didactic & Preceptor)	118	8–200	0	\$3,936	\$19.00
				Weighted Avg: 160			

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

**Minimum Wage by County: Job Number 1 (SET/HUA):** \$17.00 per hour for Monterey County.  
**Job Number 2:** \$24.72 per hour for Alameda, Marin, San Mateo, Santa Clara, and San Francisco counties; \$23.59 per hour for Contra Costa County; \$22.66 per hour for Sacramento County.  
**Job Number 3 (SET/Modified Statewide Average):** \$30.90 per hour statewide.  
**Job Number 4 (SET/Job Creation):** \$20.60 per hour for Alameda, Marin, San Mateo, Santa Clara, and San Francisco counties; \$19.42 per hour for Contra Costa County; \$18.54 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  
 Participating employers may use up to \$2.50 per hour in health benefits to meet the Post-Retention Wage for Job Numbers 2 and 3. Participating employers may use up to \$1.60 per hour in health benefits to meet the Post-Retention Wage for Job Number 4.

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1: SET / HUA Retrainee</b>		
Certified Nursing Assistant	\$19.00 - \$20.00	20
	\$20.01 - \$22.00	10
Registered Nurse	\$30.00 - \$40.00	5
Licensed Vocational Nurse	\$20.00 - \$25.00	3
	\$25.01 - \$30.00	2

<b>Job Number 2: Retrainee</b>		
Architect	\$25.00 - \$50.00	10
Engineer	\$28.00 - \$48.00	5
Designer	\$20.16 - \$25.00	5
<b>Job Number 3: SET Retrainee</b>		
Licensed Vocational Nurse	\$28.40 - \$35.00	15
Registered Nurse	\$35.00 - \$50.00	5
<b>Job Number 4: SET Job Creation</b>		
Certified Nursing Assistant	\$19.00 - \$20.00	50
	\$20.01 - \$22.00	50
Licensed Vocational Nurse	\$20.00 - \$25.00	3
	\$25.01 - \$30.00	7
Registered Nurse	\$30.00 - \$40.00	8

## **INTRODUCTION**

Founded in 1991, SOMA AEC, Inc. dba Oxman College (Oxman College) ([www.oxmancollege.com](http://www.oxmancollege.com)) is a private, post-secondary vocational school. Oxman College provides training in computer programming, computer applications, continuous improvement, and healthcare to employers throughout California (CA). The school started as a training center for recent immigrants that needed to transition to the U.S. job market, but today serves a diverse student population. In 1995, Oxman College began offering corporate training that provided customized worksite training in continuous improvement, computer skills, and manufacturing skills statewide. In 2004, it expanded into the healthcare field due to high demand for healthcare occupations and opportunities for upward mobility in high-skilled high-wage careers. In 2015, it started an onsite medical skills' program for long-term care facilities. Oxman College offers training at its campus in Daly City for New Hires and at participating employers' (PE) worksites for Retrainees and Job Creation Retrainees. For this proposal, all training will be at PE worksites.

This project will be Oxman College's eighteenth ETP Contract, and it's seventh in the last five years. This proposal continues Oxman's successful training program on Autodesk Revit software for architectural and engineering firms, as well as training in Medical Skills for long-term nursing facilities in the healthcare industry. Both industries served are designated as priorities and have strong job-growth demands in careers with strong wage-progression possibilities. This proposal features 90% of new PEs and an estimated 140 seats with new trainees that were not a part of the previous 17 projects.

### **Veterans Program**

Although this project does not include a Veteran's Job Number, Oxman College offers priority enrollment to veterans into programs, as well as priority hiring for the college's faculty and staff.

### **Retrainee – Job Creation**

In this proposal, Oxman College will train 118 new employees (Job Number 4). 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.

Hiring needs at long-term care (LTC) facilities is based on patient censuses and staff ratios. Due to the COVID-19 pandemic, there has been increased demand for Certified Nursing Assistants (CNA) in CA. Facilities are serving more patients that require short-term or long-term rehabilitation for recovering from COVID. To accommodate the increased demand (business-capacity growth), these LTC facilities need to hire new staff.

### **Employer Demand**

Participating employers in Job Number 2 have expressed a need for training because they are struggling to keep up with technology and competitors. The number of Architects is expected to grow at an average rate compared with the total for all occupations in CA. Jobs for Architects are expected to increase by 8.7% (or 1,600 jobs) between 2018 and 2028. Also, about 17,500 openings for Designers are projected each year (on average) over the next decade.

For Job Numbers 1, 3, and 4, the number of Nursing Assistants (NA) is expected to grow much faster than the average growth rate for all occupations in CA. Jobs for NAs are expected to increase by 14.3% (or 10,900 jobs) between 2018 and 2028. Jobs for Licensed Vocational Nurses (LVN) are expected to increase by 15.1 percent (or 11,600 jobs) between 2018 and 2028.

According to a recent study by the University of CA, San Francisco, CA faces nursing shortages in part due to COVID-19 retirements. Oxman College represents a current shortage of 40,567 full-time equivalent Registered Nurses (RN), which is a 13.6% gap that is projected to persist until 2026. For allied healthcare generally CA is reportedly still facing shortages of qualified staff to meet growing healthcare demands in part due to the growing aging populations, retirements of medical professionals, and rampant career changes happening within the field.

### **PROJECT DETAILS**

The training plan for Job Number 2 will focus on upgrading skills via training on Autodesk Revit software, which is the newest generation of Computer-Aided Design type software for engineering/architectural companies. The software is sophisticated and complex with multiple (15) modules that will require detailed training. ETP training will allow participating employees to remain competitive as the current demand for services utilizing this newest generation of Revit software has increased significantly. Trainee needs will be evaluated, and trainees will be placed in appropriate levels needed to upgrade their skills.

The training plan for Job Numbers 1, 3, and 4 will consist of Medical Skills, Computer Skills, and Continuous Improvement courses. Training will focus on establishing and maintaining a continuous quality-improvement program to promote best practices in each trainee's daily routine, while improving the overall quality of patient care at each facility and providing advanced medical skills to meet ongoing technological and Affordable Care Act requirements within the healthcare industry.

### **Training Plan**

Training will be conducted via Class/Lab, E-Learning, and Didactic and Clinical Preceptor (Medical Skills) delivery methods in the following:

**Computer Skills:** this training will be offered to all occupations on topics that include Revit Architecture, Computer Programming, and Rhino Modeling.

**Continuous Improvement:** this training will be offered to CNAs, LVNs, and RNs on topics that include Communication Skills, Critical Thinking Skills, and Problem Analysis and Problem Solving.

**Medical Skills:** this training will be offered to CNAs, LVNs, and RNs on course topics like Wound Management, Respiratory Care, Infection Control, and Patient Assessment and Care. Trainees

will participate in clinical skills training via both Didactic and Clinical Preceptor training delivery methods.

### **Medical Skills' Trainer-to-Trainee Ratio for Clinical Preceptor**

Per ETP's Medical Skills (MS) guidelines, preceptor training is a type of clinical training during which trainees observe hands-on skills performed by a registered nurse or practitioner (i.e. – preceptor/mentor) in a productive work environment. After observing the preceptor, trainees perform the skills under the preceptor's close supervision. Competencies and skills are integral to preceptor training. Training is designed to ensure trainees acquire specific skills/competencies. Training is typically provided using a 1:1 preceptor/trainee ratio. However, the ratio must not exceed 1:10 (per MS guidelines) even though standards issued by California Department of Public Health (CDPH) and other medical industry agencies permit training of preceptor using a ratio of up to 1:15. This higher 1:10 ratio allows flexibility and is more cost effective than adhering with lower trainer-to-trainee ratios. In most cases, the ratio used will be actually lower. A small portion of the preceptor training needs the higher trainee-to-trainee ratio of 1:10 due to the journey-level medical specialist needed to deliver the training and due to shortages of such specialists, generally.

### **Medical Skills**

#### **➤ Full-time Employment Modification**

Per ETP's MS guidelines, MS trainees may be considered as employed full-time with a minimum of 24 hours of employment a week provided that level of weekly employment qualifies the employee for a similar employee benefit plan (sick leave, vacation, health, dental, vision, retirement, etc.) on a proportionately equal basis. Thus, Oxman College requests that retention be satisfied by employment of at least 30 hours a week for its MS trainees in Job Numbers 1, 3, and 4.

### **Special Employment Training (SET) Job Numbers 1, 3, and 4**

Under SET, the participating employer (PE) is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. Per ETP's Retrainee-Job Creation guidelines, a Job Creation project may be funded under SET, in which case, SET trainees shall be subject to the ETP Minimum Wage for New Hires – not SET wages which is the case here for Job Number 4.

#### **➤ Priority 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 \$41.20 to \$30.90). The Company requests this modification for Job Number 3.

### **High Unemployment Areas**

Trainees in Job Number 1 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Oxman College's PE locations in Monterey County are in a HUA.

#### **➤ Wage Modification**

These trainees qualify for the ETP Minimum Wage instead of the Statewide Average Hourly Wage. The Panel may further modify the ETP Minimum Wage by up to 25% if post-retention

wages exceed the pre-retention wages (from \$22.66 to \$17.00). The Company requests this modification for Job Number 1 but only to \$19.00. Approximately, five LVNs and 25 CNAs will need the wage modification. The remaining five RNs inside the Job Number 1 are anticipated to earn above the \$30.90 per hour post-retention wage requirement, even though the occupations are inside the HUA waiver by Job Number.

#### ➤ Retention Modification

The Panel may also modify the retention period for these trainees in Job Number 1, making it 90 days out of 120-consecutive days with up to three employers. The Company requests this modification for Job Number 1.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. Training varies by each PE and is both job specific and companywide. Training includes mandatory, organization-wide, in-service training in such topics as elder abuse, OSHA, harassment prevention, and confidentiality. This training will continue to be provided without ETP's support. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

Oxman College's President (dedicated administrator) and four dedicated staff members are responsible for scheduling training, enrolling trainees, tracking training hours, and meeting with ETP staff. These dedicated staff members are experienced in the ETP process and are administering the current ETP Contract. Training will be delivered by highly qualified instructors who are in-house subject-matter experts with industry expertise and with an understanding of advanced clinical processes to ensure competency and to improve overall quality of patient care. CDPH requires instructors at the long-term care facilities to have at least two years of nursing experience and completion of 24-hour course in Director of Staff Development. Its instructors for Medical Skills reportedly meet and exceed this requirement.

### **Impact/Outcome**

- Improved Patient Care: quality of patient care is one of the indicators for LTC facilities, which is evaluated by Medicare annually. The goal of this ETP training is to support the efforts of each participating employer to reach a higher rating by Medicare.
- Upgraded Skills: small architecture and engineering companies need to have employees proficient in Autodesk Revit for collaborative and cost effective design to remain competitive.
- Improved Customer Satisfaction: ETP training will help to enhance staff proficiency both in vital clinical skills and in in-patient interaction skills, leading to increased customer satisfaction.
- Improvement in clinical skills of PE staff as reflected in the annual evaluations, and better results in evaluations that reportedly lead to annual wage increases for employees.
- Medical Skills training helps facilities to reduce number of deficiencies cited by CDPH during annual survey visits.
- Team Building training helps employees to communicate more effectively and improve collaboration in interdisciplinary teams. The enhanced work environment helps with retention, quality of patient care, and reducing incidents.

### **Training Agency Certification**

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. Most schools must also be licensed by the BPPE.

Oxman College is eligible as a training agency based on the following:

- BPPE licensure approval for the proposed training subjects.
- Successful past performance with ETP (see Prior Project table).

### **Supplemental Information Requested by Panel**

- Oxman College represents its CNA program has been approved by CDPH since 2007.
- Oxman College represents it has approval from the Board of Registered Nursing (BRN) since 2017 to provide Continuous Education Units (CEU), provider CEP16882. The BRN approved CEUs are valid for RNs, LVNs, and CNAs.

Represented BPPE Approvals:

- The Medical Skills (didactic and clinical preceptor) courses and Continuous Improvement course are reportedly approved as a part of Job Site Skills' course.
- CNA program is approved by BPPE and by CDPH.
- Restorative Nursing Assistant course is reportedly approved by BPPE,
- Oxman's Revit courses are reportedly approved by BPPE as a part of the Computer Aided Drafting program.

### **Marketing and Support Costs**

Oxman College's marketing program consists primarily of referrals by the Employment Development Department (EDD), different counties' Social Services agencies, WorkSource centers, and community organizations. The school recruits prospective students using a combination of resources such as its peer referral system, flyers, brochures, and catalogs as well as direct telephone and email contacts with employers.

Oxman College is requesting the standard 8% support costs for outreach and recruitment, and to schedule coordination for this project. Recruitment includes trainee intake assessments to determine eligibility, job development, and job search assistance and placement. Individuals are referred to the school by EDD One-Stop Career Centers' staff members through presentations, word of mouth, advertising, and program flyers. Staff recommends the 8% support costs for retraining.

### **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**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

### **Prior COVID Pilot Contract**

Oxman College has completed the COVID Pilot program (ET21-0185) with a term of 10/26/20 to 10/25/22. Of an estimated 100 trainees, 115 have been enrolled and 100 have received the maximum hours of training. This ETP Contract reflects \$200,000 (100% of the contract amount) in payments earned with the placement of 100 trainees per the Cal-E-Force (CEF) 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	Potential Earnings (Based on Tracked Hours) (\$ %)
ET22-0326	\$598,764	6/30/22 – 6/29/24	206	211	39	\$598,764 (100%)*
ET22-0104 (Expansion Funds)	\$596,304	12/20/21 – 12/19/23	197	262	218	\$564,343 (94%)**

\*ET22-0236 Contractor confirms all training has been completed to reflect over 100% of training hours in CEF and therefore reportedly expects to place and earn 100%. At present 39 placements have been determined and the earned amount is \$61,500. To date, the Contractor has submitted \$402,354.39 in invoices and has additional invoices to submit bringing the earnings to potentially 100%.

\*\*ET22-0104: the Contractor currently has 109% of tracked training hours in the CEF system and anticipates 100% placement. Of invoices submitted to date, \$564,343 has been paid or (94% of approved amount) and 218 trainees were confirmed by ETP's Fiscal Unit as placed. Additional invoices are being submitted to date.

**PRIOR PROJECTS**

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

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET21-0238	Statewide	12/14/20 – 12/13/22	\$449,196	\$449,196 (100%)
ET20-0125	Statewide	9/1/19 – 8/31/21	\$747,118	\$747,118 (100%)
ET18-0128	Statewide	9/1/17 – 8/31/19	\$943,400	\$943,400 (100%)

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A

**Exhibit B: Curriculum****Class/Lab/E-Learning****Job Number 2**

Trainees may receive any of the following:

**COMPUTER SKILLS**

- Adobe and Multimedia
- Advanced MS Office
- Advanced Revit
- Computer Programming
- Creating & Modifying Design in Revit
- Creating Custom Families in Revit
- Creating Views of the Model in Revit
- Foundation, Beams, and Framing Systems in Revit
- Importing and Exporting Files in Revit
- Intermediate Revit
- Networking
- Performance Analysis in Revit
- Revit Architecture
- Revit Fundamentals
- Revit MEP
- Revit Structure
- Revit User Interface
- Rhino Modeling
- Sketchup
- Structural Analysis in Revit
- Using Autodesk Dynamo Studio Software with Revit
- Visualization and Rendering Tools
- Worksharing in Revit
- Working with Revit System Families

**Class/Lab/E-Learning****Job Numbers 1, 3, & 4**

Trainees may receive any of the following:

**CONTINUOUS IMPROVEMENT**

- Communication Skills
- Customer Service
- Interdepartmental Collaboration
- Interdisciplinary Team
- Problem Analysis and Problem Solving
- Quality Assurance/Performance Improvement (QAPI)
- Team Building in Healthcare
- Conflict Resolution Skills

- Critical Thinking Skills
- Setting Goals
- Organization and Time Management Skills
- Leadership Skills
- Six Sigma in Healthcare

**MEDICAL SKILLS (DIDACTIC)**

- Alzheimer's Disease and Related Disorders
- Antibiotics Stewardship
- Assault Crisis Management
- Bipolar Disorder
- Blood borne Pathogens
- Change in Condition Management
- COVID-19
- CPI De-Escalation Skills
- Dementia Care
- Depression Causes/Intervention
- Diabetic Management
- Dialectical Behavior Therapy (DBT)
- Documentation/Abbreviation
- Evaluation and Assessment Procedures/Criteria
- Infection Control
- Interdisciplinary Team Process
- Intravenous Therapy
- Medical Diagnosis
- Medical Direction in Long-Term Care
- Medication Administration Management
- Mental Health
- Nursing Assistant Training Program
- Nursing Assistant Skills
- Pain Management (Acute and Chronic)
- Pillars of Recovery
- PointClickCare Software
- Preventive Skin Care Measures
- Problems and Needs of the Aged
- Psychosocial Rehabilitation
- Psychotropic Medication Side Effects
- Reporting to MDs-Assessing Clients
- Resident and Family Education
- Respiratory Care
- Restorative Nurse Assistant
- Restraint and Restraint Reduction
- Safe Transfer
- Signs and Symptoms of Cardiopulmonary Distress
- Skin Assessment
- Social and Recreational Needs of the Aged
- The Wellness Recovery Action Plan

- Therapeutic Communication
- Urinary Management
- Weights, Vitals, and Immunizations
- Wound Management
- Advanced Cardiac Life Support (ACLS)
- Basic Life Support (BLS)
- Communication in Nursing
- Culturally Competent Care
- Healthcare Provider BLS/CPR

**Medical Skills (Preceptor) (Trainer-to-Trainee Ratio 1:10)**

- Activities of Daily Living
- Antibiotics Stewardship
- Assessing of Tube-Fed Individuals with Diabetes
- Assisting and Performing Self-Care Skills with Patients
- Assistive Devices
- Bowel and Bladder Care
- Training of Patients Breathing Patterns and Respiratory Function
- Cardiac Conditions
- Charting Care of Clients with COPD
- Care of Clients with Diabetes
- Care of Clients with Hypertension
- Clinical Skills Review
- COVID-19
- CPI De-Escalation Skills
- Colostomy Care
- Conduct Range of Motion Exercises with Patient
- Dementia Care
- Dementia/Alzheimer's Enteral Feeding Management
- Entry Level Nursing Skills
- Facilitating Functional Gains of Each Patient
- Feeding Tube (Insertion, Intermittent, and Continuous)
- Functional Mobility and Ambulation
- Gastrointestinal Conditions
- Identification of Patient Change in Condition
- Identification of Skin Impairments and Prevention
- Immunizations
- Incontinence Management (Colostomy Care)
- Infection Control
- Intravenous Therapy
- Isolation Techniques
- Managing Patients with Neurovascular Conditions
- Medication Management
- Monitoring of Cardiovascular Changes
- Nursing Assistant Training Program

- Nursing Assistant Skills
- Operate Safety Devices with Patient
- Pain Management
- Patient Assessment and Care
- Patient Care of Foot and Hand
- Patient Safety
- PointClickCare Software
- Positioning of Patients for Correct Body Alignment
- Postoperative Care
- Preceptor Skills (Train-the-Trainer)
- Preparing Patient for Procedure
- Preventing and Identifying Complications Related to Tube Feeding
- Proper Use of Exercise Equipment
- Rehabilitation Services (Physical, Occupational, and Speech Therapy)
- Residents with Special Needs
- Respiratory Care
- Restorative Nursing Assistant Care
- Safe Patient Handling
- Setting Behavioral Program Objectives for Patients
- Signs and Symptoms of Cardiopulmonary Distress
- Skeletal/Orthopedic Conditions
- Special Program Techniques for the Mentally Disordered
- Therapeutic Activities
- Therapeutic Exercises
- Use of Durable Medical Equipment
- Weights and Vitals
- Wound Management

## Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: SOMA AEC, Inc. dba Oxman College  
Reference No: 22-1044

CCG No.: ET24-0106  
Page 1 of 3

ALPHABETIZE BY COMPANY NAME

Company: Capital Post Acute

Priority Industry? ☒ Yes ☐ No

Address: 6821 24<sup>th</sup> Ave

City, State, Zip: Sacramento, CA 95822

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Contract: 60

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 85

Total # of full-time company employees in California: 85

Company: Carmel Hills Care Center

Priority Industry? ☒ Yes ☐ No

Address: 23795 Holman Hwy

City, State, Zip: Monterey, CA 93940

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: 105

Total # of full-time company employees in California: 105

Company: Cedarwood Post Acute

Priority Industry? ☒ Yes ☐ No

Address: 1090 Rio Ln

City, State, Zip: Sacramento, 95822

Collective Bargaining Agreement(s): No

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 33

Total # of full-time company employees in California: 33

Company: Daniel MacDonald Architects

Priority Industry? ☒ Yes ☐ No

Address: 1500 Grant Ave # 200

City, State, Zip: Novato, CA 94945

Collective Bargaining Agreement(s): No

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 8

Total # of full-time company employees in California: 8

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: SOMA AEC, Inc. dba Oxman College  
Reference No: 22-1044

CCG No.: ET24-0106  
Page 2 of 3

ALPHABETIZE BY COMPANY NAME

Company: Golden State Adult Day Health Center

Priority Industry? ☒ Yes ☐ No

Address: 738 La Playa St

City, State, Zip: San Francisco, CA 94121

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: 30

Total # of full-time company employees in California: 30

Company: Hornberger + Worstell Architects

Priority Industry? ☒ Yes ☐ No

Address: 170 Maiden Ln 1st floor

City, State, Zip: San Francisco, CA 94108

Collective Bargaining Agreement(s): No

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 14

Total # of full-time company employees in California: 14

Company: Integrated Pain Management

Priority Industry? ☒ Yes ☐ No

Address: 3160 Garrity Way

City, State, Zip: San Pablo, CA 94806

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Contract: 14

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 11

Total # of full-time company employees in California: 11

Company: Mountain View Health Center

Priority Industry? ☒ Yes ☐ No

Address: 2530 Solace Place

City, State, Zip: Mountain View, CA 94040

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Contract: 55

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 85

Total # of full-time company employees in California: 85

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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

Contractor's Name: SOMA AEC, Inc. dba Oxman College  
Reference No: 22-1044

CCG No.: ET24-0106  
Page 3 of 3

ALPHABETIZE BY COMPANY NAME

Company: Page and Turnbull Architects

Priority Industry? ☒ Yes ☐ No

Address: 170 Maiden Ln 5th floor

City, State, Zip: San Francisco, CA 94108

Collective Bargaining Agreement(s): No

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 52

Total # of full-time company employees in California: 52

Company: Peninsula Post-Acute

Priority Industry? ☒ Yes ☐ No

Address: 1609 Trousdale Dr

City, State, Zip: Burlingame, CA 94010

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Contract: 116

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 196

Total # of full-time company employees in California: 196

Company: Todd Jersey Architecture

Priority Industry? ☒ Yes ☐ No

Address: 1321 Eighth St Ste 2

City, State, Zip: Berkeley, CA 94710

Collective Bargaining Agreement(s): No

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 6

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



**Training Proposal for:**  
**San Joaquin County Economic Development Association**

**Contract Number: ET24-0131**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** J. Fetsch

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100 SET HUA	Industry Sector(s):	MEC (H) Manufacturing (33) Trade Wholesale (42) Construction (23)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Joaquin	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$137,310		\$9,552 8%		\$146,862

In-Kind Contribution:	50% of Total ETP Funding Required	\$224,400
-----------------------	-----------------------------------	-----------

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Comm Skills, Computer Skills, Cont. Impvt, Mfg Skills	152	8-200	0	\$738	\$17.00
				Weighted Avg: 30			
2	Retrainee Priority Rate SB <100 HUA	Business Skills, Comm Skills, Computer Skills, Cont. Impvt, Mfg Skills	10	8-200	0	\$738	\$17.00
				Weighted Avg: 30			
3	Retrainee Priority Rate SET HUA	Business Skills, Comm Skills, Computer Skills, Cont. Impvt, Mfg Skills	10	8-200	0	\$738	\$17.00
				Weighted Avg: 30			
4	Retrainee Priority Rate SB<100 SET HUA	Business Skills, Comm Skills, Computer Skills, Cont. Impvt, Mfg Skills	15	8-200	0	\$738	\$17.00
				Weighted Avg: 30			
5	Retrainee SB<100 SET HUA	Business Skills, Comm Skills, Computer Skills, Cont. Impvt, Mfg Skills	12	8-200	0	\$738	\$17.00
				Weighted Avg: 30			

\*Post-Retention Wage is the Contractual Wage

**Minimum Wage by County:** Job Numbers 1-5 (HUA): \$17.00 per hour in San Joaquin County.

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

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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Job Numbers 1-5		
Fiber Optic Installer	\$17.00-\$20.00	3
	\$20.01-\$25.00	3
	\$25.01-\$50.00	2

Administration Staff	\$20.00-\$25.00	2
	\$25.01-\$50.00	3
Machinist	\$31.88-\$41.44	2
Mechanic Helper	\$24.26-\$25.00	1
	\$25.01-\$31.53	5
Mechanic	\$31.88-\$44.69	55
Quality Clerk	\$17.00-\$20.00	4
	\$20.01-\$24.00	2
Quality Inspector	\$19.83-\$20.00	2
	\$20.01-\$25.00	18
	\$25.01-\$31.00	11
Tungsten Inertia Gas Welder	\$31.46-\$48.00	6
Producer	\$20.00-\$25.00	2
Technician	\$17.00-\$20.00	15
	\$20.01-\$25.00	10
	\$25.01-\$50.00	5
Machine Operator	\$20.00-\$25.00	1
CNC Programmer	\$25.00-\$30.00	1
Welder	\$20.00-\$25.00	1
Production Assembly Team Member	\$17.00-\$20.00	2
	\$20.01-\$25.00	6
	\$25.01-\$35.00	2
Maintenance Mechanic	\$17.00-\$20.00	4
	\$20.01-\$25.00	1
	\$25.01-\$35.00	2
Quality Control Team Member	\$17.00-\$20.00	4
	\$20.01-\$25.00	3
Labeler	\$17.00-\$20.00	10
	\$20.01-\$25.00	8
Accounting Coordinator	\$20.01-\$25.00	1
Safety Specialist	\$20.01-\$25.00	1
Payroll Clerk	\$25.01-\$30.00	1

## **INTRODUCTION**

Established in 1963 and headquartered in Stockton, San Joaquin County Economic Development Association (SJC) ([www.sjcworknet.org](http://www.sjcworknet.org)) serves as a one-stop economic development and business resources center committed to meeting the needs of business, industry, and the community through a number of programs and initiatives in San Joaquin County. The Company's business resources include skilled workforce training, business financing, business advocacy, and business retention and expansion programs. SJC also recruits for companies with job openings and is proactive in layoff aversion efforts.

SJC maintains close working relationships with local employers, municipalities, the San Joaquin County Employment and Economic Development Department, and the local Chamber of Commerce. This is SJC's second ETP Contract and second in the last five years.

### **Veterans Program**

SJC does not actively recruit Veterans, however participating employers may employ Veterans.

## **PROJECT DETAILS**

Participating employers are looking to improve employee skills to address changes in the workforce and meet future demand. The global economy and tight labor market underscore the need for training to bolster competitiveness and financial viability. Companies are also looking to streamline processes and increase efficiency.

Additionally, as automation and artificial intelligence perform more tasks, there continues to be massive disruption resulting in the elimination or curtailment of jobs in traditional occupations across the industrial spectrum. However, the new economy and continual evolution of technology is also transforming the job market and presenting new opportunities. Employers are tasked with finding workers that either have the incumbent education and skills or have access to relevant training as proposed in this application. Therefore, a wider array of education and skills-building programs need to be introduced to satisfy emerging and growth industry workforce demands and bolster the employers' competitiveness.

### **Training Plan**

Customized training for individual employers will be provided at the employers' facilities. Training will be provided to trainees via Class/Lab and E-Learning.

**Business Skills:** Training will be provided to all occupations. Training is intended to provide the skills to effectively and efficiently maintain business operations. Training topics include Customer Relationship Management, Planning and Organization, and Project Management.

**Commercial Skills:** Training will be provided to all occupations with the exception to Payroll Clerk, Accounting Coordinator, and Administrative Staff. These courses are intended to improve efficiencies in installation projects. Topics include Fiber Optic Installation, Structured Cabling, and Best Practices for Installation.

**Computer Skills:** Training will be provided to all occupations. Training will be provided to improve software competencies. Training topics include CAD/CAM, Smart Draw/Visio, and Wireless Networking Administration.

**Continuous Improvement:** Training will be provided to all occupations. Training will focus on Lean management operations. Training topics include Kaizen, Lean Manufacturing and Product Knowledge.

**Manufacturing Skills:** Training will be provided to all occupations with the exception of Administration Staff. Training is focused on equipment operation and technical skills. Topics include Equipment Operations, Maintenance Troubleshooting, and Production Operations.

## High Unemployment Area

Trainees in Job Numbers 1 and 2 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in San Joaquin 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 pre-retention wages. SJC is requesting a wage modification from \$22.66 per hour to \$17.00 per hour in Job Numbers 1 and 2. Approximately 77 Technicians, Administration Staff, and Fiber Optic Installers, Production Assembly Team Members, Maintenance Mechanic, Quality Control Team Members, Labeler, Accounting Coordinator, Safety Specialist, and Payroll Clerk will need the wage modification.

## Special Employment Training

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

### ➤ Wage Modification

Trainees in Job Numbers 1-5 work in an HUA. This is a region with unemployment exceeding the state average by 25%. The Company's locations in San Joaquin County are in an HUA.

These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the pre-retention wages. SJC is requesting a wage modification from \$30.90 per hour to \$17.00 per hour in Job Numbers 3 and 4; and \$41.20 per hour to \$17.00 per hour in Job Number 5. Approximately 35 Administration Staff, Mechanic Helpers, Quality Clerks, Quality Inspectors, and Producers will need the wage modification.

## 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 delivered primarily at participating employers' worksites, with occasional center-based classes for employers with similar training needs. SJC's Analyst III and two additional staff members will oversee the administration of the ETP Contract.

## Marketing and Support Costs

Marketing consists of mail, email, and direct face-to-face outreach. Support costs of 8% will be used to recruit additional participating employers and assess employer specific job training requirements throughout the term of the project. Staff recommends the 8% support costs for Job Numbers 1-5.

**Trainer Qualifications**

Training will primarily be delivered by vendors. However, some training may also be provided by participating employers' experienced trainers.

**Tuition Reimbursement**

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

**PRIOR PROJECTS**

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

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET19-0241	Stockton	11/5/2018- 11/4/2020	\$194,772	\$166,481 (85%)

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Strategic Planning
- Conflict Resolution
- Customer Relationship Management
- Cost Control
- Marketing/Sales Techniques
- Negotiating
- Planning and Organization
- Product Knowledge
- Project Management
- Retaining Customers
- Business Performance
- Payroll System
- Financial Strategies
- Inventory Control
- Accounting Management
- Motivation Skills
- Effective Supervision
- Supervisor Skills
- Business Email

**Commercial Skills**

- Fiber Optic Theory
- Fiber Optic Communication Systems
- Termination, Testing and Splicing
- Fiber Optic Network Design
- Fiber Optic Installation
- Industry Standards on Fiber Cabling
- Factors Affecting Fiber Performance
- Fiber Cable Construction and Applications
- Fusion Splicing, Testing and Troubleshooting
- Surveillance System
- Network Video Solutions
- Network Cameras
- Camera Applications
- Video Encoders
- Video Management Software
- Network Design Solutions
- Structured Cabling
- Copper Cabling System Installation
- System Overview
- Cable Management

- Best Practices for Installation
- Troubleshooting, Termination, Testing, and Labeling

**Computer Skills**

- CAD/CAM
- Smart Draw/Visio
- Microsoft Suite (Intermediate/Advanced only)
  - Microsoft Word
  - Microsoft Outlook
  - Excel
  - PowerPoint
- Wireless Networking Administration

**Continuous Improvement Skills**

- Problem Solving/Decision Making
- Root Cause Analysis
- Teambuilding
- Improving Workflow
- Eliminating Waste
- Quality Control
- 5S
- Kaizen
- Lean Manufacturing
- Process Improvement
- Leadership/Coaching
- Process Capability
- Process and Change Implementation Practices
- Product Knowledge
- Problem Solving
- Customer Specifications

**Manufacturing Skills**

- Equipment Operations
- Standard Procedures
- Maintenance Troubleshooting
- Assembly Process Control
- Manufacturing Practices
- Warehousing
- Production Operations
- Machine Safety
- Labeling Process
- Robot Control
- Programmable Logic Controllers
- Welding
- Forklift Training

## Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: San Joaquin County Economic Development Association CCG No.: ET24-0131

Reference No: 22-1055

Page 1 of 2

ALPHABETIZE BY COMPANY NAME

Company: Advance Data Communications

Priority Industry? ☒ Yes ☐ No

Address: 167 D'Arcy Parkway

City, State, Zip: Lathrop, CA, 95330

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: 15

Total # of full-time company employees in California: 15

Company: Aero Turbine

Priority Industry? ☒ Yes ☐ No

Address: 6800 South Lindbergh St.

City, State, Zip: Stockton, CA, 95206

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Contract: 97

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 220

Total # of full-time company employees in California: 120

Company: Farmers Insurance

Priority Industry? ☐ Yes ☒ No

Address: 829 Rosemarie Lane

City, State, Zip: Stockton, CA, 95207

Collective Bargaining Agreement(s): No

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

Company: Inertia Engineering

Priority Industry? ☐ Yes ☒ No

Address: 6665 Hardaway Rd.

City, State, Zip: Stockton, CA, 95215

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: 80

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

ALPHABETIZE BY COMPANY NAME

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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

Contractor's Name: San Joaquin County Economic Development Association		CCG No.: ET24-0131
Reference No: 22-1055		Page 2 of 2
<hr/>		
Company: Simwon America Corp.	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Address: 400 D'Arcy Parkway		
City, State, Zip: Lathrop, CA 95330		
Collective Bargaining Agreement(s): No		
Estimated # of employees to be retrained under this Contract: 45	Small Business? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Total # of full-time company employees worldwide: 300		
Total # of full-time company employees in California: 75		
<hr/>		
Company: Vanderlans & Sons Inc.	Priority Industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Address: 1320 South Sacramento St.		
City, State, Zip: Lodi, CA, 95240		
Collective Bargaining Agreement(s): No		
Estimated # of employees to be retrained under this Contract: 8	Small Business? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Total # of full-time company employees worldwide: 46		
Total # of full-time company employees in California: 44		
<hr/>		



**Training Proposal for:**  
**Workforce Development Board of Contra Costa County dba**  
**WDBCCC**

**Contract Number: ET24-0247**

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** J. Fetsch

**PROJECT PROFILE**

Contract Attributes:	Retrainee New Hire Priority Rate SET Medical Skills Training	Industry Sector(s):	Services Healthcare  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Contra Costa	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No United EMS Workers- Local 4911		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤0%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$695,980		\$53,695 Job Number 1: 8% Job Number 2: 12%		\$749,675

In-Kind Contribution:	50% of Total ETP Funding Required	\$744,500
-----------------------	-----------------------------------	-----------

## **TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority Rate SET Medical Skills Training	Medical Skills- Didactic, Medical Skills- Preceptor	125	8-200	0	\$4,231	\$22.64
				Weighted Avg: 172			
2	New Hire Priority Rate SET Medical Skills Training	Medical Skills- Didactic, Medical Skills- Preceptor	40	8-260	0	\$5,520	\$22.64
				Weighted Avg: 219			

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

**Minimum Wage by County:** Job Number 1: \$22.64 per hours (Collective Bargaining Agreement wage) in Contra Costa and Alameda County. Job Number 2 (New Hire): \$19.66 per hour in Contra Costa County and \$20.60 per hour in Alameda County.

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

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

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Emergency Medical Technican (EMT)	\$22.64-\$25.00	25
	\$25.01-\$41.90	100
<b>Job Number 2</b>		
Medical Assistant	\$23.00-\$25.00	16
	\$25.01-\$26.00	4
Emergency Medical Technician (EMT)	\$22.64-\$25.00	5
	\$25.01-\$41.90	15

## **INTRODUCTION**

Founded in 1994 and located in Concord, the Workforce Development Board of Contra Costa County (WDBCCC) ([www.wdbccc.com](http://www.wdbccc.com)) is a public/private partnership that provides local and regional workforce development services and training to the unemployed for the community, participating employers and youth. WDBCCC serves Contra Costa and Alameda Counties and training will be delivered at participating employers' sites and WDBCCC's training facility in Richmond. The main participating employer in this project is American Medical Response (AMR) with whom WDBCCC has a close working relationship. This will be WDBCCC's third ETP Project and third in the last five years.

## **Veterans Program**

WDBCCC recruits Veterans through its advertisements and mailing lists.

## **Union Support**

Emergency Medical Technicians (EMT) are represented by United EMS Workers- Local 4911. The union has submitted a letter of support for this training project.

## **PROJECT DETAILS**

WDBCCC has plans to support high demand for and low supply of qualified workers competing for allied health positions. Currently, there is a high vacancy rate in entry level positions for medical assistants, EMT's and other allied health positions. Local health providers are requesting cultural competence and more diversity in these positions. These occupations are front line caregivers for the clients of the health providers in the Bay Area. Participating employers have expressed interest in new hires as well as upscaling existing employees.

The Bay Area Health Care economy continues to expand and retirements in health care occupations continue to increase. The healthcare delivery system continues to focus on more home care and care at the first line of engagement. Over the last three years, the role of Medical Assistants and EMT's have all increased and their Scope of Practice continues to grow and expand. WDBCCC have trained over one thousand allied health workers in the Bay Area over the last two years, but the vacancy rates for entry level skilled allied health jobs continues to increase. Trainees continue to higher-level, more secure jobs in health career paths. WDBCCC expects this trend to continue over the next five years. ETP training will assist in this area and meet this need by providing much needed training to workers in the area and help promote upward mobility. EMT and MA training consists of well over 200 and 260 hours so contractor will easily meet the high average hours presented in this proposal.

## **Training Plan**

Training will be delivered via Class/Lab/E-Learning/Medical Skills-Didactic and Medical Skills-Preceptor Training. For New Hire Training, the curriculum has been developed to meet the needs of employers by providing necessary skills to enter the workforce. In order to provide necessary skills, WDBCCC is requesting up to 260 training hours which is allowed in New Hire Projects.

**Medical Skills (Didactic):** Training will be offered to all occupations. Training will provide knowledge in medical terminology and responding to medical emergencies. Topics include Medical Terminology, Bleeding Control, Patients with Special Challenges, and Incident Management.

**Medical Skills (Preceptor):** Training will be offered to all occupations. Training will provide real world clinical practice to apply skills learned in didactic training. Topics include Pediatric Emergencies, Face & Neck Injuries, and SKILLS Patient Assessment Scenarios. Training will be provided at a lower trainer to trainee ratio (1:10) to ensure trainees receive the attention to detail while in the field. The trainees will observe a qualified mentor or other practitioner in a productive work environment then the trainee will perform the skills under the trainer's close supervision.

## **Special Employment Training**

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the

statewide average hourly wage at the end of the retention period. However, new hires under SET trainees are subject to the ETP New Hire Minimum Wage (\$19.66 per hour in Contra Costa County and \$20.60 per hour in Alameda County) rather than the Statewide Average Hourly Wage (\$30.90).

### **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**

WDBCCC's Program Manager, who has experience with ETP, will oversee all aspects of this training program. The program manager and a team of three associates will schedule training, collect rosters, and enter them into the ETP system. The team will also check rosters for compliance.

### **Marketing and Support Costs**

WDBCCC marketing includes recruiting costs, tracking students and follow up to ensure retention with employer partners. The Board recruits through job fairs, high schools and adult education programs, trade shows, and through community based organizations. The Board also partners with employers along with regulatory agencies to develop and approve curriculum. WDBCCC works with employers gaining feedback for student success and efficacy in order to determine process and learning improvements and meets with employers quarterly to assess and discuss program enhancements and needs for the continued success of programs, students and employers.

WDBCCC requests 8% support cost for Job Number 1 and 12% for Job Number 2 to assist with the effective implementation of this project, which will require on-going recruitment, assessment and oversight. The school is requesting the extra support costs for Job Number 2 to accommodate for extra recruiting marketing costs for a New Hire Project. Staff recommends the support costs.

### **Trainer Qualifications**

WDBCCC will utilize trainers from Alameda County Consortium, of Clinics, Castro Valley Adult Education, and Mt. Diablo Adult Education who are certified-medical instructors with highly-skilled knowledge in all procedures of the medical industry to provide Medical Skills- Didactic training.

### **Tuition Reimbursement**

WDBCCC 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.

**ACTIVE PROJECTS**

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

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Retained	Potential Earnings (Based on Tracked Hours) (\$ %)
ET24-0190 (HWAFF)	\$741,040	8/28/2023- 3/30/2027	120	0	\$0.00 (0%)

WDBCCC currently has an active HWAFF project that was approved at the August Panel meeting. Of an estimated 120 trainees, 0 have been enrolled and 0 have received the minimum hours of training.

**PRIOR PROJECTS**

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

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET20-0162	Concord	6/30/2020- 6/29/2022	\$220,230	\$180,377 (82%)

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Medical Skills (Didactic)**

- Medical Terminology
- The Human Body
- EMS Systems
- Workforce Wellness and Safety
- Medical, Legal and Ethical Issues
- Communications and Document
- CPR Intro Skills
- Basic Life Support
- Lifting & Moving Patients
- Lifespan Development
- Testing & Sign Offs (CPR)
- Bleeding Control
- Shock Lecture
- Intro to Trauma Assessment
- Orthopedic Injuries
- Soft Tissue Injuries
- SKILLS Patient Assessment Scenarios
- Face & Neck Injuries
- Head & Spine Injuries
- Chest Injuries
- Gynecological Emergencies
- Obstetrics & Neonatal care
- Pediatric Emergencies
- Geriatric Emergencies
- Patients w/ Special Challenges
- Psychiatric Emergencies
- Terrorism Response
- Incident Management

**Medical Skills (Preceptor)**

- EMS Systems
- CPR Intro Skills
- Basic Life Support
- Lifting & Moving Patients
- Testing & Sign Offs (CPR)
- Bleeding Control
- Orthopedic Injuries
- Soft Tissue Injuries
- SKILLS Patient Assessment Scenarios
- Face & Neck Injuries
- Head & Spine Injuries

- Chest Injuries
- Gynecological Emergencies
- Obstetrics & Neonatal care
- Pediatric Emergencies
- Geriatric Emergencies
- Patients w/ Special Challenges
- Psychiatric Emergencies
- Terrorism Response
- Incident Management

# Participating Employers in Retrainee Multiple Employer Contracts

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

Contractor's Name: Workforce Development Board of Contra Costa County CCG No.: ET24-0247  
dba WDBCCC

Reference No: 24-0242

Page 1 of 1

ALPHABETIZE BY COMPANY NAME

Company: American Medical Response (AMR) - West

Priority Industry? ☒ Yes ☐ No

Address: 2400 Bisso Lane

City, State, Zip: Concord, CA 94520

Collective Bargaining Agreement(s): AFSCME

Estimated # of employees to be retrained under this Contract: 80

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 13,995

Total # of full-time company employees in California: 7,617

Company: Eagle Ambulance

Priority Industry? ☒ Yes ☐ No

Address: 3251 Franklin Canyon Road - 2<sup>nd</sup> Floor

City, State, Zip: Rodeo, CA 94572

Collective Bargaining Agreement(s): N/A

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

Small Business? ☒ Yes ☐ No

Total # of full-time company employees worldwide: 500

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

Company: John Muir Health

Priority Industry? ☒ Yes ☐ No

Address: 2540 East St

City, State, Zip: Concord, CA 94520

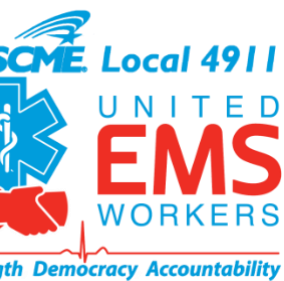
Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Contract: 25

Small Business? ☐ Yes ☒ No

Total # of full-time company employees worldwide: 3,000

Total # of full-time company employees in California: 3,000



September 14, 2023

Employment Training Panel  
1100 J Street  
Sacramento, CA 95814

Dear Panel Members,

We understand that the Workforce Development Board – Contra Costa County is requesting ETP funding. The proposed training plan for the specified members has our support. We estimate about 125 EMT Trainees will be participating in this project.

United EMS Workers, AFSCME, Local 4911, has received a Notice of Intent to train our 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.

Thank you for your consideration.

Sincerely,

*Jeffery Misner*

Labor Relations Representative  
United EMS Workers AFSCME Local 4911





Employment Training Panel

**LIST OF PROPOSALS  $\leq$  \$75,000 APPROVED  
BY DELEGATION ORDER FOR 09/19/23 – 10/16/23**

<b><i>Project</i></b>		<b><i>Approved Date</i></b>	<b><i>Approved Amount</i></b>
ET24-0221	Autism Behavior Service Inc.	09/25/23	\$34,086
ET24-0128	E.A. Machining, Inc.	10/09/23	\$6,900
ET24-0229	Etchegaray Farms LLC	10/16/23	\$74,290
ET24-0224	Gustav Keoni dba Precision Construction Services	10/16/23	\$36,570
ET24-0223	L&M Logistics Group, Inc.	10/13/23	\$52,440

**Total -----\$204,286**



**RETRAINEE-JOB CREATION**  
**Training Proposal for:**  
**Autism Behavior Service Inc.**

**Delegation ≤ \$75,000 Single Employer**

**Contract Number: ET24-0221**

**Approval Date:** September 25, 2023

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** J. Garcia

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate SET SB <100 HUA	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, Stanislaus, Riverside, San Bernardino, Los Angeles, Santa Clara, Alameda, Merced, Sacramento, Monterey, San Diego, San Joaquin	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 49	U.S.: 52	Worldwide: 52
<u>Turnover Rate:</u>	1%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**In-Kind Contribution**

**\$60,240**

**Total ETP Funding**

**\$34,086**

<b>Small Business Only:</b>	Owner <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  Contract Term <input type="checkbox"/> One Year <input checked="" type="checkbox"/> Two Year
<b>Occupations to be Trained:</b>	Human Resources Specialist, Behavior Analysts, Scheduling Lead, Behavior Specialists

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority SET HUA	Comm Skills Business Skills Continuous Impr.	29	8-200	0-0	\$1,104	\$20.50
				Weighted Avg: 48			
2	Job Creation Priority SET	Comm Skills Business Skills Continuous Impr.	2	8-200	0-0	\$1,035	\$22.00
				Weighted Avg: 45			

\*Post-Retention Wage is the Contractual Wage

#### Minimum Wage by County:

Job Number 1 SET Priority: \$30.90 per hour Statewide.

Job Number 1 HUA SET Priority: \$17.00 per hour in the City of Victorville in San Bernardino County, City of Modesto in Stanislaus County, City of Los Banos in Merced County & San Joaquin County.

Job Number 2 (Job Creation): \$18.54 per hour in Orange & Riverside Counties.

**Health Benefits: Used to meet the Post-Retention Wage?:** ☐ Yes ☒ No

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

Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Behavior Analyst	\$35.00 - \$50.00	20
Behavior Specialist (HUA)	\$20.50 - \$35.00	9
<b>Job Number 2</b>		
Human Resources Specialist	\$22.00 - \$35.00	1
Scheduling Lead	\$22.00 - \$35.00	1

**OVERVIEW**

<b>Year Company Founded:</b>	2010	<b>Company Headquarters:</b> <input type="checkbox"/> Single location Santa Ana, CA
<b>Facility Locations Outside CA</b>	<ul style="list-style-type: none"> <li>• New Mexico</li> <li>• Pennsylvania</li> <li>• Washington</li> </ul>	
<b>Total Number of Facility locations in California</b>	<ul style="list-style-type: none"> <li>• 18</li> </ul>	
<b>Facility location(s) where training will occur</b>	<ul style="list-style-type: none"> <li>• Santa Ana, Orange County</li> <li>• Lake Forest, Orange County</li> <li>• Modesto, Stanislaus County <b>(HUA)</b></li> <li>• March Air Reserve Base, Riverside County</li> <li>• Barstow, San Bernardino County</li> <li>• Victorville, San Bernardino County <b>(HUA)</b></li> <li>• San Bernardino, San Bernardino County</li> <li>• Los Angeles, Los Angeles County</li> <li>• San Jose, Santa Clara County</li> <li>• Oakland, Alameda County</li> <li>• Los Banos, Merced County <b>(HUA)</b></li> <li>• Sacramento, Sacramento County</li> <li>• Monterey, Monterey County HUA</li> <li>• Oceanside, San Diego County</li> <li>• Stockton, San Joaquin County <b>(HUA)</b></li> </ul>	

<b>Nature of Business:</b>	<ul style="list-style-type: none"> <li>• Behavior therapy for individuals with disabilities</li> <li>• Services are provided in the school, home, community, or clinic settings</li> <li>• Evaluations of current behavior and therapy needs</li> <li>• Development of goals and objectives for school programs</li> </ul>
<b>Customer Base:</b>	<ul style="list-style-type: none"> <li>• Medi-Cal families</li> <li>• Commercial insured families</li> <li>• Regional Centers</li> <li>• Other government insured families including military families and children in certain school districts</li> </ul>

<b>Business / Industry Needs / Changes</b>	<ul style="list-style-type: none"> <li>• Due to the ongoing epidemic and rising diagnosis rates of Autism, there is a constant need to hire new team members and increase services across the entire state of California</li> <li>• Autism Behavior Service Inc. (Autism Behavior Services) plans to continue to: expand the number of clients served in growing areas and will therefore will need to hire additional staff to provide these services.</li> <li>• As the Company grows, it will need to also upskill and promote internal team members to higher level roles.</li> </ul>
--	---

**Training Plan:**

<b><i>Need for Training:</i></b>	<ul style="list-style-type: none"> <li>• The business needs will require additional and ongoing training.</li> <li>• ETP funding will allow the Company to continue to expand the knowledge of staff and quality of services provided in an ever-growing and changing field serving a vulnerable population. Including Applied Behavior Analytic (ABA) certification.</li> <li>• This training will include updates to standards of practice, as well as expansion on topics of higher need. Monthly and annual topics of training for technicians will relate to the post up-to-date practices and research in the industry.</li> <li>• This program will expand training, competency, knowledge, and skillset in the areas of comorbid diagnoses in relation to Autism Spectrum Disorder.</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

Commercial Skills	Continuous Improvement	Business Skills
<b>Job Creation Justification</b>	<input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function	

**Training Hours**

<input checked="" type="checkbox"/> Weighted Average Hours over 45	48 Hours for Job Number 1
The training that is provided by Autism Behavior Services includes a wide variety of topics and techniques. As the field of ABA is constantly changing, and research and peer reviewed studies of various topics come to light, the Company puts emphasis on staying abreast of the new discoveries and information available. The best practices are executed so that it benefits the clients and their families that the staff work with.	

## High Unemployment Area

### ➤ Wage Modification – Priority Industry ( Job Number 1)

Trainees qualify for the ETP SET Modified Statewide Wage of \$30.90 for being in a Priority Industry sector. Autism Behavior Services is requesting a wage modification from \$41.20 (Statewide Average Hourly Wage) per hour to \$30.90

### ➤ Wage Modification - HUA (Job 1)

Additionally, some of these trainees are located in an HUA, therefore are requesting an HUA wage modification to \$20.50.

The Panel may modify the ETP Minimum Wage for these trainees if post-retention wages exceed the start-of-training wages. Nine Behavior Specialist trainees in Job Number 1 work in High Unemployment Areas (HUA), regions with unemployment exceeding the state average by at least 25%. These locations are in Modesto (Stanislaus County), Los Banos (Merced County), Stockton (San Joaquin County) and Victorville (San Bernardino County).

## Alternate Recordkeeping

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

## Training Infrastructure & Administrative Plan

### • Trainers:

Training will be delivered onsite and remotely, by in-house experts, and vendors if needed. In-house trainers will be individuals with a minimum of a Master's Degree and Board Certified Behavior Analyst (BCBA) Certification.

- ☒ In-house – Types of Training: Commercial Skills, Business Skills, Continuous Improvement Skills
- ☒ Vendor – Types of Training by vendor: To be determined

- **Administration:**

Autism Behavior Services has designated the Human Resources Director to initiate, monitor and oversee ETP training and all administrative responsibilities including scheduling, managing, delivery, documentation of training, project progress, enrollment, data tracking, invoicing, and attending meetings as needed with ETP. The Human Resources Director will also receive assistance from the Development Director to ensure training and documentation are delivered in compliance with all ETP requirements.

☒ In-house

☐ Subcontractor

- **Project Oversight:**

Autism Behavior Services's Human Resources Director will be responsible for overseeing this project.

The Human Resources Director will be assisted by the Development Director who will coordinate with dedicated staff at each training facility to schedule training and obtain appropriate documentation of all delivered training.

The plan for administering the project involves scheduling of face-to-face meetings for training, follow ups for applied practice, and ongoing check ins. Trainings will be scheduled throughout the calendar year where rosters will be captured.

Training is scheduled to begin upon approval.

## Repeat Contract

<ul style="list-style-type: none"> <li>• <b>Number Of Contracts in last 5 years:</b></li> </ul>	<ul style="list-style-type: none"> <li>• 2</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Training provided / focus in last Contract:</b></li> </ul>	<ul style="list-style-type: none"> <li>• Insight Intrinsic Motivation Techniques for employees</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Difference in Training Plan:</b></li> </ul>	<ul style="list-style-type: none"> <li>• This training is different from previous projects as it relates to the most up-to-date standards of practice and research in the field to address the increasing rates of Autism diagnosis and individuals with comorbid diagnoses.</li> <li>• The Company will continue to assess the need for ongoing improvements and updates to training as per the field's standards of practice and up-to-date research.</li> </ul>

## **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 \$ %
ET21-0278	Barstow, Lake Forest, Riverside, Modesto	2/20/2021-2/19/2023	\$46,184	\$34,108.77 (73%) *
ET21-0222	Lake Forest, Riverside, Modesto	12/14/2020-12/13/2022	\$100,000	\$100,000 (100%)

\*ET21-0278: During this Contract period, the State of California put specialty vaccine restrictions in place, in which many individuals did not wish to receive the vaccination. Many patients and their families were not comfortable with outsiders in their homes during this time for health and safety reasons. Additionally, many patients lost healthcare coverage during this time, or went onto a new Medicaid/Medi-Care program, who Autism Behavior Services is not contracted with. As a result, The Company saw a reduction in the number of the associated employees who required training.

Furthermore, many individuals wanted to identify work from home opportunities, which presented the company with difficulty in receiving job candidates. While they were fortunate to not have to terminate employment positions, and continued to provide employees with training, the training classes were not as large.

## **SUBCONTRACTORS**

Subcontractor Type	Subcontractor Name	City	Cost / %
Development	N/A	N/A	N/A
Administrative	N/A	N/A	N/A
Training Vendors	TBD	TBD	TBD

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Decision Making
- Communication Skills
- Presentation Skills
- Client Service
- Compliance Management
- Effective Meetings
- Marketing
- Billing/Claims Management

**Commercial Skills**

- Functional Behavior Assessments
- Interdisciplinary Understanding of Autism Spectrum Disorder
- Understanding Funding Sources
- Discrete Trial Training
- Applied Behavior Analysis Skill Building Training and Session
- Parent Satisfaction
- Staff Support
- Clinical Evaluation
- Understanding Evidence Based Autism Treatment
- Providing Feedback
- Assessing Behavior Interventionist Performance
- Behavioral Case Conceptualization, Problem Solving, and Decision Making
- Toileting
- Motivational Interviewing

**Continuous Improvement Skills**

- Team Building
- Mentoring and Coaching Employees
- Interactive Employee Development
- Situational Management
- Employee Management and Development Skills
- Organizational Behavior
- Leadership



**Training Proposal for:**  
**E.A. Machining, Inc.**

**Delegation  $\leq$  \$75,000 Single Employer**

**Contract Number: ET24-0128**

**Approval Date:** October 9, 2023

**Panel Meeting of:** October 27, 2023

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

**Analyst:** N. Shafqat

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee SB <100	Industry Sector(s):	Manufacturing (E) Aerospace Related  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Santa Clara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 5	U.S.: 5	Worldwide: 5	
<u>Turnover Rate:</u>	0%			
<u>Managers/Supervisors:</u> (% of total trainees)	N/A			

**In-Kind Contribution**

\$5,900

**Total ETP Funding**

\$6,900

<b>Small Business Only:</b>	Owner <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  Contract Term <input type="checkbox"/> One Year <input checked="" type="checkbox"/> Two Year
<b>Occupations to be Trained:</b>	Machine Operator and Owner

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee SB<100 Priority	Continuous Impr. Computer Skills Mfg. Skills	5	8–200	0–142	\$1,380	\$27.00
				Weighted Avg: 60			

\*Post-Retention Wage is the Contractual Wage

**Minimum Wage by County:** \$24.72 per hour for Santa Clara County.

**Health Benefits: Used to meet the Post-Retention Wage?:** ☐ Yes ☒ No

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Machine Operator	\$27.00 - \$35.00	3
Owner	N/A	2

### OVERVIEW

<b>Year Company Founded:</b>	2001	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> Single location Santa Clara, CA
<b>Facility location(s) where training will occur</b>	<ul style="list-style-type: none"> <li>Santa Clara (Santa Clara County)</li> </ul>	
<b>Nature of Business:</b>	<ul style="list-style-type: none"> <li>E.A. Machining, Inc. (E.A. Machining) is a manufacturer of fittings, connectors, bushings, pins, and adapters. The Company provides services based on customers' drawings in Aerospace and other general industries.</li> <li>The Company's machine shop specializes in manufacturing precision-machined parts including</li> </ul>	

	electrical-interconnect systems, conduit assemblies, and high-current connectors.
<b>Customer Base:</b>	<ul style="list-style-type: none"> <li>E.A. Machining markets to customers in the aerospace, semiconductor manufacturing, and electronics industries.</li> <li>The Company's customer base includes Sanfran, Systima, Robertson Machining, Thermal Technology, and Engineering By Design (Syneo Co).</li> </ul>
<b>Business / Industry Needs / Changes</b>	<ul style="list-style-type: none"> <li>E.A. Machining is required to meet new AS 9100 quality standards as well as International Traffic in Arms Regulations (ITAR) customer requirements due to its new customers' equipment manufacturing needs.</li> <li>Due to this business capacity growth, there is a need for machine cross training. Machine Operators must be able to write programs with a new Autodesk software program and work with these machines using new materials to be able to meet the Company's new customer demands.</li> <li>Additionally, the Company aims to provide improved safety practices and improved use of the operational software program to streamline manufacturing.</li> <li>ETP training will assist in training the current Machine Operators on new product features that require advanced programming and manufacturing skills. Training will also help E.A. Machining manufacture its products more efficiently, while expanding its customer base.</li> </ul>

### Training Plan:

<b>Need for Training:</b>	<ul style="list-style-type: none"> <li>The Company needs to conduct new training to enable staff to follow its AS 9100 quality standards (adaptive-quality systems) when machining products via cross training on equipment. This cross training provides backup for staff members, while improving safety, and the ability and skills of the Machine Operators so they can create programs to manufacture parts (via Autodesk software), and perform operational software programming (ECi, formerly E2 Shoptech).</li> <li>Additionally, a new piece of equipment –Samsung SL 1500—has been added. Staff require training on</li> </ul>
---------------------------	---

	<p>this equipment due to a hold during COVID-19 pandemic.</p> <ul style="list-style-type: none"> <li>• Computer Skills training will be offered to all occupations with an emphasis on Autodesk software program.</li> <li>• Continuous Improvement courses will be offered to all occupations on AS 9100 (aerospace design and manufacturing standard) certification and ITAR requirements' training.</li> <li>• Manufacturing Skills will be provided to the Machine Operators on non-certified Safety Training (two hours per trainee), Lean Manufacturing, Machine Maintenance, Material Handling, and Equipment Cross Training.</li> <li>• Even though some course topics appear the same as those in prior projects, no trainee will receive duplicate training as the Company's products have changed due to its customer base's new product demands.</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

☒ CBT

Computer Skills	Continuous Improvement	Manufacturing Skills
-----------------	------------------------	----------------------

### Training Hours

<input checked="" type="checkbox"/> Weighted Average Hours over 45	60 Hours
<p>Between the Computer Skills, Continuous Improvement, and Manufacturing Skills courses identified on the Curriculum, an average of 60 hours of training will be delivered. For example, the AS 9100 Certification Training (Continuous Improvement) course will consist of 40 hours per Owner and 45 hours per Machine Operator of training. The ITAR (Continuous Improvement) course will consist of 20 hours for Owners and 15 hours for Machine Operators of training. Additionally, training on Lean Manufacturing, Machine Maintenance, Material Handling, and Equipment Cross Training (Manufacturing Skills) courses will take place across seven different machines.</p>	

### Temp-to-Perm

Average days to convert temporary workers to full time permanent employment.	90 days
Employer-paid healthcare premiums while on temporary status.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

All of E.A. Machining's employees are permanent employees and have been working for the Company for several years. None of the Company's employees listed on the training roster are temporary. However, there is one employee listed as temporary since he does not meet the 40 hour per week requirement.

### Alternate Recordkeeping

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

### Training Infrastructure & Administrative Plan

<ul style="list-style-type: none"> <li>• <b>Trainers:</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> In-house – Types of Training: Computer Skills, Continuous Improvement, Manufacturing Skills</li> <li><input checked="" type="checkbox"/> Vendor – Types of Training by vendor: Computer Skills, Continuous Improvement, Manufacturing Skills</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Administration:</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> In-house</li> <li><input type="checkbox"/> Subcontractor</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Project Oversight:</b> <p>E.A. Machining's CEO (dedicated administrator) will have oversight of the project and will coordinate and schedule training. ETP training will be delivered by approximately two (in-house) trainers who are subject-matter experts and by several (outside) training vendors.</p> </li> </ul>

### Repeat Contract

<ul style="list-style-type: none"> <li>• <b>Number Of Contracts in last 5 years:</b></li> </ul>	<p>This will be E.A. Machining's sixth ETP Contract, and its third within the last five years.</p>
<ul style="list-style-type: none"> <li>• <b>Training provided / focus in last Contract:</b></li> </ul>	<ul style="list-style-type: none"> <li>• Training included Class/Lab and E-Learning training in Business Skills, Computer Skills, Continuous Improvement, and Manufacturing Skills to improve manufacturing productivity, improve processes (general safety training), and to support (machine operation) cross-training efforts to meet capacity and sales-growth objectives.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Difference in Training Plan:</b></li> </ul>	<ul style="list-style-type: none"> <li>• While some curriculum titles are the same as those in the previous ETP Contracts, this training has been updated with new content which has not been previously delivered. No ETP-funded training will be duplicated.</li> <li>• Employees are required to learn new customer needs and meet AS 9100 quality and ITAR requirements.</li> </ul>

	<ul style="list-style-type: none"> <li>• The new cross training and programs are needed for efficient production of new mechanical parts.</li> <li>• Safety training is required as the Company is consistently evolving and handling different tools and materials.</li> <li>• E.A. Machining also needs to update its operational software to include new customer needs (i.e. - new locations, adding new part numbers, and quoting). This practice supports generating traveler documentation, which the operators use while manufacturing the parts.</li> <li>• The Company's trainees also need to understand new software features as a result of the prior operational E2 Shoptech software being purchased and merged with another company to form ECi. Consequently, its employees need to re-learn this software in order to continue to complete projects, as there are new areas of the software that were not previously available. These software updates will give employees new software skills, while streamlining the production process.</li> </ul>
--	---

## **PRIOR PROJECTS**

The following table summarizes performance under ETP Contracts completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET20-0242	Santa Clara	1/27/20 - 10/23/21	\$12,420	\$8,338 (67%)
ET18-0156	Santa Clara	1/17/18 - 1/16/19	\$11,700	\$11,700 (100%)

## **Low Performance Justification:**

E.A. Machining earned only 67% of payment for Contract ET20-0242 for the following reasons:

1) The Covid pandemic highly impacted the business and employee attendance.

- The Santa Clara Health Department shut down many businesses in order to prevent Covid from spreading.
- The Company was able to qualify as an essential business; however, the rules and requirements were changing often due to the unknown and spread of Covid. The Company was required to keep employees separate in order to prevent the spread of Covid. Additionally, the Santa Clara Health Department and the State of California established physical distancing requirements which made conducting training challenging.
- The business sales dropped significantly and the Company had to reduce its employees' hours.
- There was a total staff of 12 employees when the pandemic began. However, only six employees remained during the pandemic.

2) The Company also requested an extension to the Contract and received an extension, but due to the continuous challenges, was unable to meet the projected training hours.

**SUBCONTRACTORS**

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
Development	N/A	N/A	N/A
Administrative	N/A	N/A	N/A
Training Vendors	Adaptive Quality Systems (Continuous Improvement)	Santa Rosa	\$4,000
	CMA Quality International (Manufacturing Skills)	Whitby, Ontario	\$7,000
	Autodesk (Computer Skills)	San Rafael	\$8,000
	ECi/E2 Shoptech (Computer Skills)	Cincinnati, OH	\$10,000

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Computer Skills**

- Autodesk (CAD software)
- ECI (business-management software)

**Continuous Improvement Skills**

- AS 9100 Certification Training
  - Quality Management
  - Quality Policy
  - Risk Management
  - Managing Resources
  - Quality Objectives
  - Environment and Operations
  - Document Control
  - Systems and Processes
  - Operational Planning and Control
  - Control of External Processes
  - Identification and Traceability
  - Monitoring / Measurement
  - Management Review
  - Non-Conformity and Corrective Actions
  - Internal Audit Preparation
  - External Audit Preparation
- International Traffic in Arms Regulations (ITAR)

**Manufacturing Skills**

- Lean Manufacturing
- Machine Maintenance
- Material Handling
- Safety Training (10% cap of total-training hours per trainee)
- Equipment Cross Training
  - Samsung CNC SL 1500M Turning Center
  - Ganesh Cyclone 32CS Turning Center
  - Doosan Puma 2100SY High-Performance Turning Center
  - Eurotech 730SL Turning Center
  - Fadal Milling Centers (2)
  - Okuma Crown Turning Center
  - Cadet Turning Centers (2)

**Computer-Based Training**

Trainees may receive any of the following:

**Computer Skills**

- Autodesk
  - Autodesk FeatureCAM - Essentials/Intermediate Training (18 hours)
    - Introduction (2.5 hours)
    - Workflow (4.5 hours)
    - Programming (4 hours)
    - Automation Techniques for FeatureCAM (2 hours)
    - Model Development (Organic Surfaces) (2 hours)
    - Model Development (Traditional 2.5D features) (3 hours)
  - 3D Surface Milling Training (12 hours)
    - Introduction (1.5 hours)
    - Learn 3D Surface Milling (4.5 hours)
    - Toolpaths (3 hours)
    - Model Application (3 hours)
  - Autodesk FeatureCAM - Advanced 4th and 5th Axis Milling Training (12 hours)
    - Introduction (1 hour)
    - Foundational Understanding of Turning Toolpaths and Strategies (5 hours)
    - Utilize multiple Turret Turn-Mill Machines with Synchronization (4 hours)
    - Learning the Configuration and Workflows (2 hours)
  - Autodesk AutoCAD - Fundamentals Training: Part 1 (12 hours)
    - Core topics: Essentials of AutoCAD Software (3.5 hours)
    - Creating and Editing 2D Drawing (1.5)
    - Annotate Drawings by adding Text, Hatching, Dimensions, and Tables. (3 hours)
    - Advanced Tools: Working with Blocks and Setting up Layouts to improve Efficiency (3 hours)
  - Autodesk AutoCAD - Fundamentals Training: Part 2 (12 hours)
    - Introduction to sophisticated techniques that extend your mastery of the software (6 hours)
    - Learn beyond the basic skill of using a template to understand the process of setting up a template, creating annotation styles, and how to work with external references. (6 hours)
  - Online Training Videos (16 hours)
    - Getting Started with FeatureCAM- explores the essential skills of FeatureCAM for new users (8 hours)
    - 2D Mechanical Design and Drafting: how to be more productive with main design and documentation workflows by leveraging already accessed tools (8 hours)
- ECI/Shoptech
  - Quoting and Estimating (8 hours)
    - Introduction (1 hour)
    - Gathering data (2 hours)
    - Importing data (1 hour)
    - Generating accurate estimates (1 hours)
    - Creating and Reviewing reports (2 hours)
    - Exporting data to other programs (i.e. QuickBooks) (1 hour)
  - Order Entry (8 hours)
    - Setting up operators (1 hour)
    - Setting up scanning and compatibility (1 hour)
    - Familiarizing with format (1 hour)

- Entering data (2 hour)
  - Connectivity with other software programs (1 hour)
  - Exporting data in necessary formats (2 hours)
  - Data Collection (8 hours)
    - Understanding barcodes and correlation with company formats (2 hours)
    - Installing bar codes (1 hours)
    - How to log multiple operations accurately (2 hours)
    - Importing data (1.5 hours)
    - Exporting data (1.5 hours)
  - Purchasing (8 hours)
    - Obtaining quotes from vendors (2 hours)
    - Data entry (1 hour)
    - Generating Vendor PO (1 hour)
    - Providing PO to vendor (1 hour)
    - Collaborating timeline with production schedule (2 hours)
    - Approving or rescheduling (1 hour)
  - Material Handling and Inventory Management (8 hours)
    - Receiving and recording material (1 hour)
    - Utilizing the inventory management program (1 hour)
    - Record keeping (1 hour)
    - Adjusting inventory (1 hour)
    - Correcting inventory (1 hour)
    - Reporting (1 hour)
    - Generating customer supporting documentation (2 hours)
  - Order Tracking (8 hours)
    - Identifying orders (1 hour)
    - Correlating orders with other programs (2 hours)
    - Pulling in or pushing out orders (2 hours)
    - Schedule impact review (1 hour)
    - Generating overview reports (2 hours)
  - ECI Online Training Videos (8 hours): enables employee to view examples and engage in practice for each listed topic.
- ITAR
  - Cybersecurity Procedures (4 hours)
    - Protecting Company Devices (1 hour)
    - Securing Online Access and Connection (1 hour)
    - Adapting Safe Email Communication Practices (1 hour)
    - Creating Timely Backups to Server for Files and Documents (1 hour)



**RETRAINEE-JOB CREATION**  
**Training Proposal for:**  
**Etchegaray Farms LLC**

**Delegation ≤ \$75,000 Single Employer**

**Contract Number: ET24-0229**

**Approval Date:** October 16, 2023

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate HUA Job Creation Initiative	Industry Sector(s):	Agriculture  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kern	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 110	U.S.: 110	Worldwide: 110
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

**In-Kind Contribution**

\$95,000

**Total ETP Funding**

\$74,290

<b>Out-of-State Competition:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>Occupations to be Trained:</b>	Administrative Staff, Operational Staff, Production Staff, Supervisor

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority HUA	Business Skills Computer Skills Continuous Impr. HazMat Mfg. Skills	95	8-200	0	\$690	\$17.00
				Weighted Avg: 30			
2	Retrainee Job Creation Priority HUA	Business Skills Computer Skills Continuous Impr. HazMat Mfg. Skills	10	8-200	0	\$874	\$17.00
				Weighted Avg: 38			

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

#### **Minimum Wage by County:**

Job Number 1 (Priority/HUA): \$17.00 per hour for Kern County.

Job Number 2 (Priority/HUA/Job Creation): \$17.00 per hour for Kern County.

**Health Benefits: Used to meet the Post-Retention Wage?:** ☐ Yes ☒ No

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1 (HUA)</b>		
Administrative Staff	\$19.00 - \$20.00	12
Operational Staff	\$17.00 - \$17.50	41
Production Staff	\$17.00 - \$17.50	33
Supervisor	\$18.75 - \$19.50	9
<b>Job Number 2 (Job Creation/HUA)</b>		
Operational Staff	\$17.00 - \$17.50	10

### OVERVIEW

<b>Year Company Founded:</b>	2002	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> Single location McFarland, CA
------------------------------	------	---

<b>Nature of Business:</b>	<ul style="list-style-type: none"> <li>Etchegaray Farms LLC (Etchegaray) (<a href="http://www.etchegarayfarms.com">www.etchegarayfarms.com</a>) is a multi-faceted farming operation that harvests and grows grapes and nut crops.</li> <li>The Company also packs and processes its products for delivery to its consumers.</li> </ul>
<b>Customer Base:</b>	<ul style="list-style-type: none"> <li>Manufacturers and wholesalers across the US and worldwide.</li> </ul>
<b>Business / Industry Needs / Changes</b>	<ul style="list-style-type: none"> <li>Company has experienced a 10% growth in business and is anticipating a 10% growth over the next 12 months.</li> <li>Etchegaray is committed to hiring 10 new employees (Job Number 2) over the next two years.</li> <li>Over \$500,000 has been invested in new equipment and systems, including harvesting machines, ERP software, and soil and moisture telemetry system. Etchegaray anticipates the installation date to be November 30, 2023.</li> <li>Equipment and systems will be upgraded to improve operational efficiencies while maintaining quality products.</li> <li>Workforce skills must be upgraded to keep up with customer demands, technological advances, and business growth.</li> </ul>

### Training Plan:

<b>Need for Training:</b>	<ul style="list-style-type: none"> <li>Existing and new workers will be provided with training to gain required skills, adapt to new equipment and systems, attract new customers, improve production and services, create effective and efficient production processes, and standardize processes and procedures across all departments.</li> <li>The Company has developed a formalized company-wide training program, which includes Business Skills, Computer Skills, Continuous Improvement, HazMat, and Manufacturing Skills.</li> <li>Training on new equipment and systems will provide better service and products.</li> <li>Training will improve worker performance, and increase wages and retention.</li> <li>Training will allow Etchegaray to remain competitive, exceed customer expectations and demands, and keep up with technological advances and industry requirements.</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

Business Skills	Computer Skills	Continuous Improvement
HazMat	Manufacturing Skills	

<b>Job Creation Justification</b>	<input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function;  <input checked="" type="checkbox"/> The Company has committed to hiring 10 new employees and is currently going through the hiring and interviewing processes.
-----------------------------------	---

### High Unemployment Area

All trainees in Job Numbers 1 and 2 work in McFarland (Kern County), a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%.

#### ➤ Wage Modification (HUA)

For trainees in a HUA, the Panel may further modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the pre-retention wages. Etchegaray requests a wage modification for the trainees in Job Number 1 from \$22.66 to \$17.00 per hour and Job Number 2 from \$18.54 per hour to \$17.00 per hour for Kern County.

Approximately 84 trainees in Operational Staff and Production Staff will need the wage modification.

### Training Infrastructure & Administrative Plan

<ul style="list-style-type: none"> <li><b>Trainers:</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> In-house – Types of Training: Business Skills, Computer Skills, Continuous Improvement, HazMat, and Manufacturing Skills. Five in-house trainers who have a decade of farming operations experience.</li> <li><input checked="" type="checkbox"/> Vendor – Types of Training by vendor: To Be Determined</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li><b>Administration:</b> <ul style="list-style-type: none"> <li>Human Resources Manager, Accounting Staff, Management Personnel</li> <li><input checked="" type="checkbox"/> In-house</li> <li><input checked="" type="checkbox"/> Subcontractor</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li><b>Project Oversight:</b> <p>The Company's Human Resources Manager will oversee the training project and administrative responsibilities. The Company has designed a team of two Accounting Staff and two Management Personnel to schedule, document and deliver training, secure rosters, and ensure</p> </li> </ul>

ETP compliance. The Company has also retained a third party subcontractor to support project administration duties including enrollment, data tracking, invoicing, participating in ETP monitoring, and ensuring compliance with ETP requirements.

### **SUBCONTRACTORS**

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
Development	Strategic Business Solutions, LLC	Visalia	\$5,250
Administrative	Strategic Business Solutions, LLC	Visalia	13% of payment earned
Training Vendors	To Be Determined		

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Account Development
- Marketing
- Purchasing Best Practices
- Effective Communications
- Coaching and Mentoring
- Production Scheduling
- Shipping Logistics
- Vendor/Customer Relations

**Computer Skills**

- Famous BI Software Training
- Microsoft Applications (Intermediate and Advanced)
- Bar Code Scanning System

**Continuous Improvement Skills**

- Strategic Planning
- Alchemy Training
- British Retail Consortium (BRC)
- Food Product Safety
- Leadership
- Teambuilding
- Sanitation Best Practices
- Quality Control Systems
- Lean Processes
- Hazard Analysis Critical Control Point (HACCP) (Quality Assurance)

**Hazardous Materials Skills**

- Hazardous Materials
- Hazardous Materials Labels

**Manufacturing Skills**

- Computer Assisted Machinery
- Computer Programmed Conveyor Systems Combustible Dust
- Confined Spaces
- Materials Handling Equipment
- Programmable Controllers
- Sorting Processes
- Equipment Maintenance and Repair Skills
- Welding Training



**Training Proposal for:**

**Gustav Keoni dba Precision Construction Services**

**Delegation  $\leq$  \$75,000 Single Employer**

**Contract Number: ET24-0224**

**Approval Date:** October 16, 2023

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**PROJECT PROFILE**

Contract Attributes:	SB <100 SET Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Luis Obispo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 43	U.S.: 43	Worldwide: 43
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**In-Kind Contribution**

\$57,960

**Total ETP Funding**

\$36,570

<b>Small Business Only:</b>	Owner <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  Contract Term <input type="checkbox"/> One Year <input checked="" type="checkbox"/> Two Year
<b>Out-of-State Competition:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>Occupations to be Trained:</b>	Engineer, Project Associate, Project Administrator, Estimator, Preconstruction, Business Operations, Coordinator, Marketing, Environmental Health & Safety, Human Resources, Operations, Owner

### TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Retrainee Priority SET SB<100	Business Skills Computer Skills Continuous Impr. HazMat OSHA 10/30	39	8-200	0	\$690	\$30.90
				Weighted Avg: 30			
2	Retrainee Job Creation Priority SET SB<100	Business Skills Computer Skills Continuous Impr. HazMat OSHA 10/30	14	8-200	0	\$690	\$25.00
				Weighted Avg: 30			

\*Post-Retention Wage is the Contractual Wage

**Minimum Wage by County:** Job 1: \$30.90 per hour and Job 2: \$18.54 per hour in San Luis Obispo 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 Job 1.

Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Engineer	\$30.00 - \$49.00	10
Project Associate	\$55.00 - \$89.00	10
Estimator	\$32.00 - \$49.00	4
Preconstruction	\$43.00 - \$77.00	2
Business Operations Coordinator	\$30.00 - \$43.00	1
Marketing	\$28.40 - \$62.00	2

Environmental Health & Safety	\$48.00 - \$62.00	1
Human Resources	\$28.40 - \$49.00	1
Operations	\$48.00 - \$62.00	6
Owner	\$65.00 - \$100.00	2
<b>Job Number 2</b>		
Engineer	\$25.00 - \$35.00	5
Project Administrator	\$25.00 - \$49.00	2
Estimator	\$30.00 - \$49.00	2
Preconstruction	\$32.00 - \$49.00	5

## **OVERVIEW**

<b>Year Company Founded:</b>	2013	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> Single location
<b>Facility location(s) where training will occur</b>		<ul style="list-style-type: none"> <li>San Luis Obispo</li> </ul>

<b>Nature of Business:</b>	Gustav Keoni dba Precision Construction Services (GK) is a Native-American owned commercial construction firm. GK's work encompasses every aspect of construction: design-build, general contracting, and construction management.
<b>Customer Base:</b>	<ul style="list-style-type: none"> <li>Federal Government</li> <li>California Utilities</li> <li>Commercial Construction</li> </ul>

<b>Business / Industry Needs / Changes</b>	<ul style="list-style-type: none"> <li>Respond to upgrade in technology needs of the industry; installed a new software (P6 Primavera)</li> <li>GK is experiencing higher demand for their services and needs to upgrade the skillset of their employees, focusing on Computers Skills, Quality Control and OSHA 30.</li> <li>GK is gaining a wider market which requires creation of new positions and adding more manpower to provide their services</li> </ul>
--	---

<b>Need for Training:</b>	<ul style="list-style-type: none"> <li>New Equipment</li> <li>New Software (installed on July 1, 2023)</li> <li>Advances in construction technology</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

<b>Business Skills</b>	<b>Computer Skills</b>
<b>Continuous Improvement</b>	<b>HazMat</b>

<b>Certified Safety Training</b>	<input checked="" type="checkbox"/> OSHA 10/30
----------------------------------	--

<b>Job Creation Justification</b>	<input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function; and  <input checked="" type="checkbox"/> Opening specific new plants or facilities, expanding or upgrading existing facilities, and/or repurposing existing unused space/buildings or facilities.
-----------------------------------	---

### Training Infrastructure & Administrative Plan

<ul style="list-style-type: none"> <li><b>Trainers:</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> In-house – Types of Training: Business Skills, Continuous Improvement, Hazardous Materials Skills, OSHA 10/30</li> <li><input checked="" type="checkbox"/> Vendor – Types of Training by vendor: Computer Skills: Primavera P6 Professional Fundamentals provided by PPM Global Services</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li><b>Administration:</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> In-house</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li><b>Project Oversight:</b> GK has a training plan in place that is ready to be administered upon approval of this ETP contract. The Senior Human Resources Manager will oversee the project and will be assisted by the Environment Health &amp; Safety Manager and the Construction Operations Administrator to facilitate scheduling, training and collecting attendance rosters for submission to the ETP Cal-E-Force.</li> </ul>

### SUBCONTRACTORS

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
Development	N/A	N/A	N/A
Administrative	N/A	N/A	N/A
Training Vendors	To Be Determined	To Be Determined	To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Marketing
- Business Administration
- Financial Strategies
- Project Management
- Strategic Planning
- Conflict Management
- Interpersonal Skills
- Leadership Development
- Decision Making
- Teambuilding
- Administration
- Coaching

**Computer Skills**

- Computerized Scheduling
- Sales Forecasting
- Inventory Control
- Cost Accounting
- Document Control
- Payroll
- General Accounting
- Financial Modeling
- Primavera P6 Professional Fundamentals

**Continuous Improvement Skills**

- Problem Solving
- Teambuilding
- Quality Control
- Process Improvement
- Green Building Certificate Training

**Hazardous Materials Skills**

- Asbestos Removal
- Hazardous Materials Handling
- Hazardous Chemical Handling
- Fall Protection/Safety

**Safety Skills - OSHA 10/30 (Certified-OSHA Instructor)**

- OSHA-10
- OSHA-30



**Training Proposal for:**  
**L&M Logistics Group, Inc.**

**Delegation  $\leq$  \$75,000 Single Employer**

**Contract Number: ET24-0223**

**Approval Date:** October 13, 2023

**Panel Meeting of:** October 27, 2023

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee SET SB <100 HUA	Industry Sector(s):	Transportation/Communication Transportation Warehousing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 80	U.S.: 80	Worldwide: 80	
<u>Turnover Rate:</u>	5%			
<u>Managers/Supervisors:</u> (% of total trainees)	N/A			

**In-Kind Contribution**

\$100,568

**Total ETP Funding**

\$52,440

<b>Small Business Only:</b>	Owner <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Contract Term <input type="checkbox"/> One Year <input checked="" type="checkbox"/> Two Year
<b>Out-of-State Competition:</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<b>Occupations to be Trained:</b>	Administrative Staff, Operations Staff

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage*
				Class / Lab	CBT		
1	Priority Retrainee SET SB<100 HUA	Business Skills Comm Skills Computer Skills Continuous Impr.	57	8-200	0	\$920	\$19.75
				Weighted Avg: 40			

\*Post-Retention Wage is the Contractual Wage

**Minimum Wage by County:** Job Number 1 (SET/HUA): \$17.00 per hour for Los Angeles County.

**Health Benefits: Used to meet the Post-Retention Wage?:** ☐ Yes ☒ No

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

Current Wage Range by Occupation		
Occupation Titles	Actual Wage Range	Estimated # of Trainees
Administrative Staff	\$19.75 - \$25.00	6
Operations Staff	\$19.75 - \$25.00	51

**OVERVIEW**

<b>Year Company Founded:</b>	2000	<b>Company Headquarters:</b> <input type="checkbox"/> Single location Las Vegas, Nevada
<b>Total Number of Facility locations in California</b>	• 1	
<b>Facility location(s) where training will occur</b>	• Lancaster (Los Angeles)	

<b>Nature of Business:</b>	<ul style="list-style-type: none"> <li>L&amp;M Logistics Group, Inc. (L&amp;M) is an established, experienced, transportation and government contracts consulting corporation.</li> </ul>
<b>Customer Base:</b>	<ul style="list-style-type: none"> <li>Amazon customers</li> <li>Amazon</li> <li>California Government</li> </ul>

<b><i>Business / Industry Needs / Changes</i></b>	<ul style="list-style-type: none"> <li>• Employees are required to take training on Amazon's updated procedures and compliance requirements.</li> <li>• New updates to Federal and State logistics laws requires training for all employees.</li> <li>• Amazon updated their software system which requires all employees to be trained on the updates.</li> </ul>
---	--

**Training Plan:**

<b><i>Need for Training:</i></b>	<ul style="list-style-type: none"> <li>• Operations Staff will receive training on Amazon's updated procedure and compliance requirements. Training will ensure the trainee knows proper delivery standards and expectations from Amazon.</li> <li>• Administrative Staff and Operations Staff will receive in depth training on Amazon's updated version of Carrier Logistics, Inc. so trainees know how to accurately navigate the system.</li> <li>• Operations Staff will receive extensive training in Distribution Skills, Inspection Techniques, and Logistics Skills. Training will prepare the trainee for receiving, packing, inventory, and delivering packages.</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

<b>Business Skills</b>	<b>Commercial Skills</b>	<b>Computer Skills</b>
<b>Continuous Improvement</b>		

**Special Employment Training/ High Unemployment Area**

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

**➤ Wage and Retention Modifications**

The 57 trainees in Job Number 1 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 25%. The Company's location in Los Angeles County is in an HUA.

These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages.

Approximately 51 Operations Staff and 6 Administrative staff will need the wage modification from \$30.90 per hour to \$19.75 per hour for Job Number 1.

**Alternate Recordkeeping**

Staff has reviewed and approved the Company's request to use an alternate recordkeeping method.

**Training Infrastructure & Administrative Plan**

- **Trainers:**

- ☒ In-house – Types of Training: Business Skills, Commercial Skills, Computer Skills, and Continuous Improvement.
- ☒ Vendor – Types of Training by vendor: To Be Determined

- **Administration:**

Training Funding Source

- ☐ In-house
- ☒ Subcontractor

- **Project Oversight:**

L&M represents that ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. Training is both job specific and companywide, and includes safety, legal compliance, and on-the-job training. Training will be delivered at L&M's Lancaster location. The Company's annual training budget is approximately \$100,000 annually and includes new hire orientation and safety training.

L&M's Operations Manager will oversee the Contract along with coordinating training and gathering rosters. Training will be delivered by in-house experts and vendors as needed. In addition to the assigned staff members, the Company has also retained the services of a third party administrator with extensive ETP experience to assist with administration.

**SUBCONTRACTORS**

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
Development	Training Funding Source	Seal Beach	\$1,900
Administrative	Training Funding Source	Seal Beach	13%
Training Vendors	To Be Determined	To Be Determined	To Be Determined

**Exhibit B: Curriculum****Class/Lab/E-Learning**

Trainees may receive any of the following:

**Business Skills**

- Accounting
- Coaching
- Communication
- Credit and Collection
- Customer Relations
- Inventory Control
- Selling Tactics
- Time Management

**Commercial Skills**

- Distribution Skills
- Inspection Techniques
- Inventory Control – Cycle Counting
- Inventory Management
- Logistic Skills
- Logistics Management
- Quality Control
- Shipping and Receiving
- Warehouse Skills

**Computer Skills**

- Carrier Logistics, Inc. (CLI)
- Financial Accounting Software (FACTS)
- Quickbooks
- Ovation Payroll
- Davinci Software
- Microsoft Office (Intermediate and Advanced)
- Microsoft SQL Server
- Script Writing for Report Generation

**Continuous Improvement Skills**

- Process Improvement
- Teambuilding