

PANEL PACKET

APRIL 2015





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Friday, April 24, 2015 at 9:30 a.m.
California Environmental Protection Agency, 1001 I Street
Coastal Hearing Room, 2nd Floor
Sacramento, CA 95814
Phone: (916) 327-5640

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Lomita Chamber of Commerce
Mitchell International, Inc.
Pacific Sintered Metals, A Division of PSM Industries, Inc. (Amendment)
Perkins Inc. dba African American Expressions
Quincy Engineering, Incorporated
Senga Engineering, Inc.



M e m o r a n d u m

To: Panel Members

Date April 15, 2015

From: Stewart Knox
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **April 24, 2015 at 9:30 a.m.**

**California Environmental Protection Agency
Coastal Hearing Room, 2nd Floor
1001 I Street
Sacramento, CA 95814**

Telephone (916) 327-5640 (ETP Central Office)
FAX: (916) 445-5972 (ETP Central Office)

Directions to the California Environmental Protection Agency - Coastal Hearing Room

From Sacramento International Airport:

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

From San Francisco

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



M e m o r a n d u m

To: Panel Members

Date April 15, 2015

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

April 24, 2015	California Environmental Protection Agency Coastal Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
May 21, 2015	California Environmental Protection Agency Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
June 26, 2015	California Environmental Protection Agency Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
July 24, 2015	California Environmental Protection Agency Time: 09:30 AM Coastal Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814



NOTICE / AGENDA

MEETING TIME/PLACE

Friday, April 24, 2015 at 9:30 a.m.
California Environmental Protection Agency, 1001 I Street
Coastal Hearing Room, 2nd Floor
Sacramento, CA 95814
Phone: (916) 327-5640

AGENDA

9:30 a.m.	Call to Order by Chair <ul style="list-style-type: none">• Roll Call• Agenda• Minutes	Barry Broad
9:45 a.m.	Report of the Executive Director <ul style="list-style-type: none">• Legislative/Budget/Other• Request Motion to Delegate in Event of Loss of Quorum/Action• Request Motion to Adopt Consent Calendar Projects/Action	Stewart Knox
10:00 a.m.	Action on Small Business Incentives for a MEC	Stewart Knox Maureen Reilly
10:15 a.m.	Review and Action on Proposals	Gregg Griffin Willie Atkinson
11:45 p.m.	Public Comments	
12:00 p.m.	Public Meeting Adjourns	

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

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

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

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

REVIEW AND ACTION ON PROPOSALS

These funding proposals are listed by Regional Offices and do not reflect the actual order of presentation. They will be considered by the Panel in accordance with a Table of Contents to be published on the ETP website no later than Monday, April 20, 2015 although the Panel may still change the order at the meeting.

North Hollywood Regional Office

El Camino Community College District, Center for Applied Competitive Technologies (CACT)-----	\$649,350
Glendale Community College Professional Development Center (Amendment) -----	\$273,902
Kern Community College District (Amendment) -----	\$375,198
PRN Ambulance, Inc.-----	\$120,160
Studio Arts (Amendment)-----	\$375,375

San Diego Regional Office

C&D Zodiac, Inc.-----	\$306,060
Ricoh Americas Corporation-----	\$137,850

Sacramento Regional Office

Caber Enterprises, Inc. dba Mission Care Group -----	\$424,614
Dole Packaged Foods, LLC-----	\$424,320
Lancaster.Burns Construction, Inc. dba LB Construction, Inc. -----	\$140,280
Mary Ann's Baking Co., Inc. -----	\$424,616
MedAmerica Billing Services, Inc.-----	\$420,000
Valley Truck and Tractor Co. -----	\$239,520

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 03/18/2015 – 04/14/2015

≤ \$100,000

**Approved
Date**

**Approved
Amount**

North Hollywood Regional Office

Elite Ambulance, Inc.	04/02/15	\$49,998
Empire Transportation, Inc.	04/14/15	\$99,725
Integrated Media Technologies, Inc. (Amendment)	03/27/15	\$5,720
Lomita Chamber of Commerce	04/10/15	\$94,420
Pacific Sintered Metals, A Division of PSM Industries, Inc. (Amendment)	04/07/15	\$6,240

San Diego Regional Office

Architectural Design & Signs, Inc.	04/09/15	\$49,920
Mitchell International, Inc.	03/27/15	\$79,920
Senga Engineering, Inc.	04/07/15	\$14,040

San Francisco Bay Area Regional Office

Alpha EMS Corporation	04/14/15	\$38,880
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Sacramento Regional Office

5 th Planet Games Inc.	04/06/15	\$39,312
Atlas Disposal Industries, LLC (AB118)	04/01/15	\$9,360
Bennett Engineering Services Inc.	04/07/15	\$13,936
Perkins, Inc. dba African American Expressions	04/02/15	\$9,680
Quincy Engineering, Incorporated	04/09/15	\$49,504



**STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL MEETING**

California Environmental Protection Agency

1001 I Street

Sierra Hearing Room, 2nd Floor

Sacramento, CA 95814

March 27, 2015

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Sonia Fernandez
Member

Kish Rajan
Member

Edward Rendon
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

Maureen Reilly
General Counsel

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL MEETING
California Environmental Protection Agency
1001 I Street
Sierra Hearing Room, 2nd Floor
Sacramento, CA 95814
March 27, 2015

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairman Broad called the meeting to order at 9:40 a.m.

II. ROLL CALL

Present

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

Executive Staff Present

Stewart Knox, Executive Director
Maureen Reilly, General Counsel

III. AGENDA

Chairman Broad asked for a motion to approve the Agenda.

ACTION: Ms. Roberts moved and Ms. Bell seconded the motion that the Panel approves the Agenda.

Motion carried, 7 – 0.

IV. MINUTES

Ms. Roberts moved and Ms. Bell seconded the motion that the Panel approved the Minutes from March 27, 2015 meeting.

Motion carried, 7 – 0.

V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, announced ETP's new Executive Assistant, Desiree Burrier.

Mr. Knox said we have approximately \$4.5M in Projects and over \$708,000 in Delegation Orders. Following our last February Panel meeting, we have approximately \$25-30M remaining. After this Panel Meeting, about \$25m still remain, so we are holding very strong in terms of our fiscal stability. We will be discussing the funding allocations later at today's meeting.

Today we have a mix of Single Employers and Multiple Employer Projects. Regional Managers Gregg Griffin, Creighton Chan and Willie Atkinson are here today to present the proposals. Regarding the budgets, originally we have \$3M in the Alternative Fuel & Technology Program; we have approximately \$2.1M left in that unsourced. We have approximately \$2M in General Funds, and after today, if all are approved, we have about \$128,000 left for the remainder of the Fiscal Year (FY). I believe we have a couple of projects left to go out, so we will extend all of those funds.

Regarding CORE funding, beginning this year, we have about \$64.7M, and we added another \$10M, bringing our total to well over \$94M in contracting capacity. To date, the Panel has committed over \$65m to over 338 projects. We will exceed most of our years', and the last ten year's, number of projects and dollars supported. I have a brief Power Point presentation that will go into the details of that later. Today we'll consider \$4.5M in additional projects and if approved. For the remainder of the FY, we will have approximately have \$25M left to go out, so those will be big months.

In regards to the FY funding, the Panel took action in September regarding recommendations and, we are reviewing the pre-applications and applications. We do have many repeats coming in at this point. Single Employer Contracts were allocated \$51.5M, and after today's meeting, if approved, there will be approximately \$14M remaining. Multiple Employer Contracts are allocated \$19.7M. After today's meeting, if approved, we'll have \$7.2M remaining in that fund. Small Business Contracts were allocated \$6.4M; after the January meeting, we'll have approximately \$1.8M remaining. Critical Proposals were allocated \$6.1M, and after today, we'll have approximately \$1M remaining. Apprenticeships Projects were allocated over \$10M, and to date there is approximately \$744,000 remaining, with over \$1M in demand. At the next Panel Meeting, we will also address that issue and likely reallocate some of the funds to meet demands of certain project areas.

The Panel reduced the Funding Caps last year. The Single Employer cap was reduced to \$425,000; MEC cap was reduced to \$650,000; the Apprenticeship cap reduced to \$300,000 per sponsor. Today, we will revisit the allocations and the caps for the next year. We are looking for recommendations for the Panel to approve, since we now have a clearer picture of what next year's funding will look like. Also, the Panel adopted a new Delegation Order for Small Business capped at \$50,000 and other proposals capped at \$100,000 to be approved by the Executive Director on a continuous flow basis. We have expended well over \$1M in this program.

Regarding workload, as previously mentioned, we've recruited for additional positions. Recently we've hired five employees in the field offices. The Sacramento Regional Office has been augmented and production has ramped up since the last Panel Meeting.

Potential funding of applications and demands are still in the regional offices. Single Employer Contracts requests \$13M; \$14M of those remaining are still in the regional offices in terms of requests and demand. MEC regional offices are about \$3.5M in demand; \$7.2M in remaining. Small Business has \$758,000; \$1.8M remaining. Critical Proposals is at \$900,000 in demand; we have about \$1.M in remaining. Although those do change as we know, depending with Go-Biz. Apprenticeships: \$1.2 in demand with over \$744,000 remaining; we can revisit reallocating some funds to that area. Overall funds left after today is approximately \$25M; about \$20 in demand. We definitely have made it through this tough FY in terms of funding and we are looking at other priorities for the next year.

Regarding the number of projects remaining in the regional offices today: 59 Single Employer Contracts, MEC's 11; Small Business 23, Critical Proposal's 4, and Apprenticeship 2. The number of projects in AAU by category: Single Employer 7, MEC 3, Small Business 0, Critical Proposals 1, Apprentice 8; total of 18. So as you can see, most everything is in Regional Office at this point.

Mr. Knox said regarding legislation, I'd like to mention the Workforce Investment Act. We've had partnerships with Workforce Investment Board and the California Workforce Association, and the new legislation was signed last July by the President, the Workforce Innovation and Opportunity Act. I and Peter Cooper sit on several inter-agency councils working with Labor Workforce Development Agency on the Workforce Investment Act, looking at where the opportunities connect within the Employment Training Panel. We've also met with CWA and others, within the regions to look at ways the WIB, especially around rapid response and business retention expansion efforts, can work with ETP, and we are looking at ways to coordinate better in the future under the new Legislation.

The Workforce Investment Act was signed into law in 1998, implemented in CA in 2000; they finally have new legislation, and people are working diligently to come up with the State plan which is due around March of 2016. I believe the State is going to try to have a plan out for them around October. One of the components, which we're also in coordination with, is more of a regional approach, now that they'll do away with the 49 Local WIBS. That's not going to quite happen in our assumption, but they'll be more regional bases in the way they disperse some of the work, not the allocations. ETP will continue to look at how that's done, see how we can also work with that. Also, the Community Colleges, which also have regions, develop through doing what matters, which is at the Chancellors office; and again, ETP is at the table at these discussions.

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

Mr. Knox asked for a motion for the Panel to delegate authority to the Executive Director to approve.

ACTION: Ms. Roberts moved and Mr. Rodriguez seconded the approval to delegate in event of loss of quorum.

Motion carried, 7 – 0.

VII. REPORT OF THE GENERAL COUNSEL

Ms. Reilly referred to Delegation Order tab in the Panel Packet. We have approved a few from the last Panel Meeting. This month, another 15 Proposals listed in the Delegation Orders for about \$436,000 in contracts.

Barry Broad congratulated Janice Roberts, Vice Chair, and Sonia Fernandez, on their reappointment to our Panel by the Governor.

VIII. REVIEW AND ACTION ON PROPOSALS

Single Employer Proposals

Broker Solutions, Inc. dba New American Funding

Creighton Chan, manager of the Foster City Regional Office, presented a Proposal for Broker Solutions, Inc. dba New American Funding (NAF) in the amount of \$310,250. Broker Solutions, Inc. dba New American Funding (NAF) is a national mortgage banker/broker. Between 2010 and 2012, NAF established a Retail-Based Lending Division, a Wholesale Division, and a Builder Division. Training will take place at the Company's five regional operation centers in California, at 35 current and proposed new locations. Mr. Chan introduced Dusty Lloyd, National Project Manager / Senior Loan Consultant.

Mr. Broad said we wisely backed off on these projects back in 2008-2009; otherwise, we would find ourselves in the middle of a Country Wide situation once more. While I'm not suggesting that your company is behaving like that, I also don't believe, for a minute, that in your business, that anyone, once the economy recovers, will have any memory whatsoever of what got them into trouble the last time, because all those guys are gone, and a new set of people running the companies will come and then they'll be in another cycle of mortgage fraud. Supposedly the government has clamped down and says that this isn't going to happen again. We don't want to fund hard sell, questionable mortgages. I'm very concerned about that. I want you to address that. You're the first company that has come before the Panel with something like this. Please tell us what's different about your company, and that what you're going to spend is going to be training people to do things like the LA Times might test. If someone went into your company, and they were from the LA Times, and they looked at what and how you are spending our money, and how you hand out loans, they would say "there's no story here". What we want is a great story; that's what I want you to address.

Mr. Lloyd said in 2010, Dobb Frank came out with a set of regulations that changed our business. We worked the forefront of that. We're on the Mortgage Bankers Association; we're in the Washington DC area all the time. We're a minority owned, women-owned business. We looked at doing things the right way. We always looked at every decision; how do we do it the right way? And we go the right way. The regulation requires us to look at those things, provide documentations of our hours so we're up front with it. However, in August of this year, we are upgrading the ways on how to handle the process. Part of this training is to improve our whole business procedure to comply with that. We're not interested in training people about the regulations at all, but about how to do things the right way. Mr. Broad said that's kind of the answer I wanted to hear. Ms. Roberts asked if they do residential loans mostly, or commercial loans. Mr. Lloyd said we do all residential.

Ms. Roberts said, do you have all the proper documentations for the folks that you're lending to? Mr. Lloyd said, yes; we wouldn't be able to sell the loans, if we didn't. As opposed to some of our competitors that are banks, all of our people have to be state licensed. So it's a fairly high bar for everybody who works in the industry. That is something we didn't have back in 2005 and 2007, when anybody could work in the lending business. Ms. Roberts said that's good to hear. You have 35 current and proposed new locations, five employees and Regional Offices, you've got a dedicated trainer for each one of those five, and then they're going to actually bring these other 35 locations to your Regional Centers to get trained, is that the proposal?

Mr. Lloyd said that we have large training site; we have op-centers that can handle 30-40 people at a time, and then we'll do smaller sessions or via the web for those locations that are smaller. We have op-centers in Bakersfield with 6 employees in it. I will travel to Bakersfield or have another staff from Bakersfield offer web training for them. Those are treated a little different in our proposal. We can handle both, and do it quite well.

Ms. Roberts said, very well and thanks. You're very articulate and you really have a great story. I'm glad that the market business is back in action; the economy is growing and people are moving and buying new homes. I think that's important. Mr. Lloyd said that this is great for the economy, for construction, and for Home Depot.

Mr. Broad asked if they're privately owned or a publicly traded company. Mr. Lloyd said they are privately owned. We are currently the largest privately owned purchase lender in California. We're owned by Patty Arvielo; we are a women owned, minority owned business. Mr. Broad said I want to make sure there is no telephone sales element of this business. In other words, this is all about somebody who's buying a house and applies for a loan. Mr. Lloyd said the bulk of our business is me and you talking about buying a home. Mr. Broad asked at what point do you enter into a process? When I bought a home, it was a step by step process. You make the offer, the offer is accepted and then you apply for a loan. That's how it worked for me. What we don't want to fund here is telephone solicitation sales or cold calls to people. Mr. Lloyd said, no, we don't do that. The model has changed since 2008; the borrower comes to us to get them pre-approved, then the borrower makes an offer on a house. That's the bulk of our business. We make sure that borrowers understand the process, "You're going to be paying \$3000 a month, are you comfortable with that?", and not letting it go through 30 days, and then saying "Oh, I forgot to tell you this." Mr. Broad asked,

these are all first mortgages, right? Not seconds? Mr. Lloyd said correct. The bulk of our business is a first mortgage, that's all we fund.

Sam Rodriguez said on your menu of curriculum, I have a basic understanding of some of the items being bulleted, but under commercial skills, what is *Locking Loans*? Mr. Lloyd said, if we agree on the terms of the loan, I give you a 30 day commitment. That is for the folks who want documentation that we had that conversation up front. There guards them so there are no surprises 30 days later; we explain to the borrower what happens after 30 days, if for some reason when we don't close or something else happens along those lines. We want to make sure that we're very up front with our customers and we provide them documentation. Those rules are going to change in August a little bit. We want to make sure that we comply and have business processes in place to document that. Mr. Rodriguez asked if those rules are going to change in August because of federal law. Mr. Lloyd said it is called T.R.I.D. Essentially, the way it used to work is, I would mail you a set of disclosures in the beginning, and then hopefully it will be the same until the end. Things changed in 2010, so we have to provide more documentation. Now there's going to be a set of paperwork that I'm going to have to give you, the day you lock the loan, then 3 days before closing, I will have to write you additional documentations showing that nothing has changed. We think that will upgrade the lending process, but it does require operational and sales upgrades to the whole course. We can do it well; we have the facilities to grow. If you do it the right way, it will attract sales and operations people in California.

Ms. Bell asked, if I were to acquire the loan through you folks, what's the probability my loan will stay with you before it would be spun into another institute? Mr. Lloyd said, we just opened a servicing center in Austin, Texas, and we have about \$8B in servicing growing by about \$5M a month, and we routine servicing of about 95% of our loans. It's very rare that we sell off the servicing because we found that people do it the wrong way. They create glitches; that puts people's home in jeopardy and we don't want to do that. We want to do it our way, do it ourselves, because no one else can do it right, in our experience.

Mr. Broad said that that's scary. Mr. Lloyd said there are little glitches, but they make a big difference to somebody when it's a \$300,000 loan on their house. Mr. Broad said, in my experience, I've bought quite a few homes now in my lifetime, it used to be that you got the loan, held on to the loan, and maybe somewhere down the line, they sold the loan. Now they sell the loan before you even make the first month's payment. That seems to be a common practice. I don't know if that's changing.

ACTION: Ms. Roberts moved and Mr. Rendon seconded the approval of the Proposal for Broker Solutions, Inc. dba New American Funding in the amount of \$310,250.

Motion carried, 7 – 0.

Chaya Centers, Inc. dba Greenridge Senior Care

Mr. Chan presented a proposal for Chaya Centers, Inc. dba Greenridge Senior Care in the amount of \$115,068. The facility provides long term and short term care nursing services, restorative nursing, rehabilitation services, activities programs and social services. Mr. Chan said that this proposal was first presented to the Panel on the Consent Calendar of January 2015, but it was removed from Consent Calendar because it had a high turnover rate, and in that document, there was no provision for a penalty if they didn't bring down the turnover rate. The staff has put that in there, but it was inadvertently left out; now it's indicated in the agreement that they need to bring the turnover rate down to 23% under the contract. There are some additional changes when this was first developing way back then. The Panel had different procedures or policies regarding the job creation. There was no gain in that one. So since that was passed in November, they re-evaluated their figures and said they did not want to commit to 48 job creation gain. So they reduced it down to 15. However, that did not make it into the Panel Packet. They did not become aware of that until this week, so it was too late to change it.

Essentially the project that is presented to you is the same. The number of Job Creation will go down from 48 to 15. They will be transferred up to the Retrainee. That is the number that we came up with, 71. What we are asking the Panel to approve is this proposal at the amount of \$115,068. Staff will adjust the numbers, and when the contract is sent out it will reflect the additional numbers, but the agreement amount will not exceed \$115,068. Mr. Chan introduced Linda Joseph, CEO, and Bill Parker, Consultant.

Mr. Broad asked are you anticipating, that because of that shift, that the cost will go down? I'm unclear, with Job #1; it has a higher average cost per trainee than Job #2. Mr. Chan said, when we did an initial correction of numbers, it would have gone up to \$117,906. It's about \$2,000 more. So that's why we're putting the cap on. They're not going to be allowed to bring up the figures, so they're going to have to remove some trainees and reduce the numbers; but they will be capped at \$115,068. Mr. Broad said, I'm being told by the General Counsel that there are more parts to the equation, that's where you lose me. What we're dealing with is that this isn't going to cost more than \$115,086 and I don't see a reason to put it over because of this again.

Ms. Roberts said thank you for bringing it back and including that information there. You said 23%, but in our Panel Packet, it keeps mentioning 25%, is that the number that we're looking at, or 23%? Mr. Chan said that he misread it; it is 25%. Ms. Roberts said that it's fine. She thanked the representative for coming to the Panel Meeting and clarifying the numbers presented. I know that the business that you're in creates quite a bit of turnover and we have another proposal coming up that is similar to the situation you're in that's in the 16-15% turnover rate.

Ms. Joseph said there are two nursing homes and they are excellent. They've been certified by Medicare and by the State of California. One is a four out of five star building, and the other is a five out of a five star, which is the highest ranking for a nursing home. I'm very passionate about my work. Our turnover rate is high. We've become the pool for acute care for hospitals home health. Hospice companies are now sprouting too, so we're working very hard to reduce our turnover rate, but despite this we ranked very high. So we're doing

something right in providing the care. She asked if they could get a waiver from the turnover rate, if not, we will accept it and take the penalty.

Mr. Roberts said, one of the things, if it's true, through attrition, or creating a better job for the employee, I'm all for it. I've been in HR, so I know why people turn. I don't know if we can break that down, if it's attrition or the other person getting another job at a higher pay. If it's because of management issues, then that's where the problem lies. Ms. Joseph said I've been an administrator in this industry for 24 years, I can tell you that my management team is very solid. It's just the higher rates that the acute hospitals, the home health, and the hospice facilities are providing to my nurses and care givers.

Mr. Broad said this is a skilled nursing facility, so you're providing independent living care. These are people who are not in need of higher care level. They're going to get to 23%; what are they committing to? Mr. Chan said 25%. Mr. Broad said if we can't have 25%, is there a number in between? It can get you down as close to the standard 20%, which is generally the highest level that we typically accept. I understand the challenge that you face; what you can pay people is dependent on what Medicare reimburses you, and that can be insufficient. I understand that and you are in a high wage area so people, nurses, are going to acute care hospitals because they can earn a lot more money. The question is, can you commit to better than 25%? Say 23%? Ms. Joseph said sure. Mr. Broad said, ok, let's do 23%. Ms. Roberts said that's where they are now. Mr. Broad said I know they're at 23%, but why can't they commit to 25%? Mr. Chan said that the trending number is at 23%. Mr. Broad asked if they are anxious if the numbers could go up. Ms. Joseph said, yes, I am; because we are getting new nurses that we're training, and the older nurses that have acquired experience from our facility resign and move to acute hospitals. They move on to higher and bigger chains of nursing homes. Mr. Broad said, I don't know what your experience is, but every time I talk to a new graduate, they say how difficult it is to get a job as a nurse because no one will hire you if you don't have experience. Then everyone else is saying there's a nursing shortage. I don't understand what's going on in that labor market. Ms. Joseph said new nurses that apply with no experience cannot get a job in acute hospitals, so they come to us. We are a small facility with 60 beds. I provide the training; keep them for about a year to a year and a half, and now they can go to the acute because they have gained the experience and add that to their resume. They can go to the hospice companies and the home health companies and they make twice as much; but I'm the step into this whole health care paradigm, because I'm the training realm. I give them good skills. Mr. Broad said there is no changing the high turnover rate since it's built structurally into the system. Ms. Joseph said, if you look at the data, it's 44% in my industry, so I'm doing great. Mr. Broad said I don't want to punish you for being way ahead of the rest of the people in your industry in a situation that seems not ideal. Because what it's really suggesting is that, if you're an elderly person in need of skilled nursing, you're going to get less skilled nursing than you deserve, because you are dealing with people who are learning on the job because they're all brand new. That's a little bit worry-some for those of us with elderly parents. He asked if they are willing to commit to 23%.

Mr. Rodriguez asked if they are privately run. Ms. Joseph said yes. Mr. Rodriguez asked Mr. Parker if he is taking care of the administrative staff. Is it fair to say that you can potentially tag early in the process potential trainees that may not stay on track and not work with ETP? Is it 1 out of 5 that is leaving the workforce after one year, what is the ratio? Ms. Joseph said,

it is 1 out of 5, but only for charge nurses, certified nursing assistants, not housekeeping, not environmental health, not dietary, not laundry; just those two categories.

Mr. Parker said typically the turnover, is centered in some key job titles such as CNA's, Ms. Joseph has more CNA's that work at the company. We've deleted those from the project to try to avoid the confusion as much as possible. Mr. Broad asked if the turnover rate included voluntary quits. Ms. Joseph said correct. Ms. Reilly said people who would be considered voluntary quits, for purposes of unemployment insurance do not count as turnover. So you might want to look at your own figures. Mr. Broad said the common sense notion of turnover is everybody, right? We obviously have it as not including voluntary quits, which is beneficial to employers because their turnover would be much higher, so what we're doing is beneficial to you, but it may be that if the difference of 23% to 25% and your competitor, the average 44%, that would suggest that you have more job satisfaction; it's about lay-offs. We are not in a market where we're laying off people, we're in a market where we can't get them fast enough, so that still speaks well of the situation. But it'll probably makes committing to a lower turnover rate not as scary as it might otherwise be. Ms. Roberts suggested to Mr. Parker to look at the terms of the turnover according to Ms. Reilly's comments, because it could be a lot lower. Mr. Parker said, yes, it's actually 12%. I believe that was another policy change that came in after the job creation. Mr. Broad said, our standard is 20%, so if by our standard you're weighing under 20% now, you don't need anything. You can go up to 20% and not have a problem. If by our standard you're actually at 12. So maybe this is one of those things where we need a little bit more of a meeting on the mind on these issues. Mr. Broad asked Mr. Chan if the actual turnover rate 12% by our standard. Mr. Chan said that's what they say. What happens with this, while they're in development, we give them our turnover rate policy. We tell them to look it over, calculate your change and turnover and base it on policy. We assume they've read the policy and what's required, and this is the first I've heard about that. Mr. Broad said, ok, this is what we're going to do, we're going to vote and probably approve this proposal with the following caveat: that if your actual turnover rate is 12%, we're not going to do anything with the turnover rate, there's not going to be any waiver. If your turnover rate is 25%, we'll abide by this 23% commitment, but I think you're committing to something that is not necessary in this circumstance.

ACTION: Mr. Rodriguez moved and Ms. Fernandez seconded approval of the Proposal for Chaya Center Funding in the amount of \$115,068.

Motion carried, 7 – 0.

Cobham Advanced Electronic Solutions Inc.

MR. Chan presented a proposal for Cobham Advance Electronic Solutions Inc. in the amount \$199,110. The Company designs, manufactures and test, passive and active microwave modular components and sub-components. They also design and manufacture waveguide switches, coaxial witches, waveguide circulators and integrated assemblies for radar applications. Mr. Chan introduced Andrea Schafer, Senior Human Resources Manager.

There were no questions from the Panel.

ACTION: Ms. Fernandez moved and Ms. Roberts seconded the approval of the Proposal for Cobham Advanced Electronic Solutions Inc. for the amount of \$199,110.

Motion carried, 7 – 0.

Shields Nursing Centers, Inc.

Mr. Chan presented a proposal for Shields Nursing Centers Inc. in the amount of \$284,616. Shields Nursing Centers, Inc. (Shields) operates two nursing centers in Richmond and El Cerrito that specialize in providing long-term care. Both facilities are certified by Medicare and Medi-Cal to provide skilled nursing care and rehabilitation services.

The Panel may modify the SET wage up to 25% below the statewide average hourly to \$20.55 per hour. Shields requests this wage modification for trainees in Job #1 to train entry level healthcare workers and lower job applications. Job #2 will consist of trainees in companies in the Richmond facilities, which is considered a High UA with unemployment exceeding the average rate by 25%. For this reason, the trainees were qualified for ETP's minimum wage rather than the statewide average hourly rate. Shields is requesting wage modification for the 34 trainees in Job Number 2 for the Richmond facility.

This modification will put the minimum wage at \$16.44 per hour and it is reflective of the collective bargaining minimum wage. Job #3 will consist of a 33 new hire job creation SET. They will receive \$14.97 per hour as per the collective bargaining agreement, instead of the ETP's job creation rate of \$13.70, so that's over what ETP requires. Mr. Chan introduced Bill Parker, Consultant.

Mr. Broad said so basically what's happening under the ACA is that you're essentially getting patients that would require a level of treatment that previously received attention in acute care hospitals? So it's more of a complex medical treatment. Mr. Shields said absolutely. We're starting the new ICU, so we're beginning to see them a lot sicker. Mr. Broad said, at that point, there must be more increased involvement of physicians. Mr. Shields said absolutely. That's the only way. I've always said that the difference between us and acute hospital is that in an acute hospital you have physicians walking around for the nurses to ask questions and get guidance; in a skilled nursing facility, you get half of that. Well now, it looks like we have to gear up to get that to that model to be able to handle the type of patients that we're starting to see now. Mr. Broad asked if under the ACA, you simply have more covered lives and therefore fewer hospital beds available, or is it a payment level that says let's discharge patients out of the acute care hospitals as soon as possible to the sub-acute facility? Is that cheaper? Mr. Shield said, absolutely. The model is to get them out of the acute hospital sooner, and the ACA is giving a lot of power to the HMO. The HMO's now can set the model of how long they want those patients to be in acute hospitals. We're starting to see more patients that require hospitalization for up to 14 days coming to us in five days. We're starting to see very sick patients. With that coming, the staff is really concerned, and you have apprehension among other things. We have to gear up and get them trained, so they can handle these types of patients that are coming. The more we get into trenches of the ACA, the more we'll see this.

Ms. Bell asked Mr. Parker, I noticed the curriculum and the training for Chaya is almost identical to this group. When you develop the training, do you have a template? How do you customize this to different location? Mr. Parker said we worked with Shields to determine what the needs are of each facility; between the population and number of hours, they do differ between the two facilities for same job titles.

ACTION: Ms. Roberts moved and Mr. Rendon seconded approval of the Proposal for Shields Nursing Centers, Inc. in the amount of \$284,616.

Motion carried, 7 – 0.

J.J.R. Enterprises Inc. dba Caltronics Business Systems

Willie Atkinson, manager of the Sacramento Regional Office, presented a proposal for J.J.R. Enterprises Inc. dba Caltronics Business Systems. He noted a correction on the 130, it says J.R.R. and it should say J.J.R. The Company sells, leases, and services copy and facsimile machines including high-speed digital copiers and printers, multi-functional devices, and software for document management and retrieval. Caltronics is one of the largest independent dealers of Konica Minolta in the country, offering software solutions that increase efficiency and competition within the office products and services industry.

The 23 trainees in Job #1 work in High Unemployment Area (HUA). However, Caltronics is not asking for a wage modification. In this proposal, they will offer training to all Technicians and Solutions Engineers; hours will range between 0-40. Mr. Atkinson introduced Ann Long, Chief Financial Advisor, Barry Cider, Vice President Services and Consultant, John Twomey.

ACTION: Ms. Roberts moved and Ms. Fernandez seconded the approval of the Proposal for J.J.R. Enterprises Inc. dba Caltronics Business Systems for the amount of \$303,530.

Motion carried, 7 – 0.

Nichols Farms

Mr. Atkinson presented a proposal for Nichols Farm in the amount of \$423,000 to train 250 trainees. This is the second proposal for Nichols Farms. Training in the previous Agreement focused on new employees and introduced incumbent workers to continuous improvement and Lean production systems. All trainees work in a High Unemployment Area (HUA). Nichols Farms is requesting a post-retention wage modification for trainees in the proposal from \$15.07 per hour to \$11.30 per hour.

The current projects will end on the March 31, 2015. All trainees will earn 100% of the Agreement. Mr. Atkinson introduced Rebecca Macias, Human Resources Manager and Thom Akeman, Consultant, Duscha Advisories.

Ms. Roberts asked if all the employees from their previous contracts were all new hire contracts. Ms. Macias said, those were all new hires and introducing the continuous improvement to our existing employees. Ms. Roberts asked what percentage were new

hires. Ms. Macias said it's approximately about 25%. Ms. Roberts asked if the new proposal is for another group of employees or are you going to combine the existing employees with this new contract? Ms. Macias said that it is a combination.

Mr. Rodriguez asked how many employees are in the process of training and how many have completed the training under the contract ending on March 31, 2015. Mr. Akeman said there are 220 in process and 223 have completed the training. Mr. Rodriguez asked, what is the estimated number of people that are in the retention period? Mr. Akeman said 229. We'll know more in two days. Ms. Roberts asked if there was modification request from the previous agreement. Mr. Akeman said yes.

ACTION: Ms. Bell moved and Mr. Rendon seconded approval of the Proposal for Nichols Farm in the amount of \$423,000

Motion carried, 7 – 0.

Rich Products Corporation

Mr. Atkinson presented a proposal for Rich Products Corporation in the amount of \$108,200 to train 160 workers. Rich Products Corporation (Rich Foods) developed the world's first frozen non-dairy whipped topping. All 140 trainees work in a HUA, however, Rich Foods is not requesting a wage modification.

If you look at the prior project, their previous completion rate was 19%. Fresno and Santa Fe Springs, which had two locations and South San Francisco / Union City participated under that agreement. However, Fresno earned approximately 59% of their agreement allocation under that term. Under this agreement they have new processes in place and actually have a training plan in place to make sure that they are going to earn the 100% of the allocated funds under this proposal. They have a Union Support letter from Teamsters Union Local No. 431. Mr. Atkinson presented Steven Bodeer, Operations Manager, Jeremy Haynes, Plant Manager and Michael Jester, Consultant.

Ms. Bell asked about their new hire training. The Panel Packet says that you have 25 hours of Productive Lab; when do you actually do your hands on training with the new hire? Mr. Haynes said that most of our training is hands-on. We have a workforce that has 14-16 years of seniority, except for any new equipment, and then we'll have local vendors that will be doing the training. Subsequently, the associates will then take over any further training after the initial training. Ms. Bell asked what changes have been made to ensure that there will be support from leadership for this agreement as opposed to the previous agreement. Mr. Haynes said, last time we had a gap in leadership. We had time when there wasn't anyone in that position. I took that role in January 2014. Going aboard, as I and Steve Bodeer, who promoted from within, we started to write our own internal training program and the role of every operation. Ms. Roberts said the 56%, the way that you describe it, you caught it on the back end of it; this is a good start to make this happen. Ms. Roberts asked about the commitment to training. You spent about \$30,000, I just want to clarify this for all the mandated training; I did the calculation and it added up to about \$50 per employee to do training, is that right? Mr. Haynes said that their training budget was \$34,000. We do have annual training for safety; we have very little built in for the new hire training. When we went into our budget in August, we weren't sure if the new process was going to come; then it rolled through. Now

we have 3 new hires, we have brand new trainees going forward. Ms. Roberts said it sounds like your spending 2 hours of training for the entire year, that doesn't sound right. Mr. Haynes said, most of the \$30,000 you'll see is for the new trainees coming in because they actually do an eight hour orientation and training begins before they start on the workforce. Ms. Roberts said overall, this is a right size. Thank you for all your explanation.

Mr. Broad said to Michael Jester, this is the kind of scenario that calls for your extra involvement in this project and helping them make sure that they're successful. Mr. Jester said that the first project was the "perfect storm". We had two separate facilities that became one. The South San Francisco facility was moved to Union City, they did a lot of pre-planning type training. I can guarantee you that they're going to burn the money up, I am committed to helping. Mr. Rodriguez asked Mr. Jester about the status of the Bay Area plant. Mr. Jester said that the plant is fine; they couldn't commit, so they were not included in the contract.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the Proposal Rich Products Corporation in the amount of \$108,200

Motion carried, 7 – 0.

Multiple Employer Contracts

Building Skills Partnership

Gregg Griffin, manager of North Hollywood Regional Office presented a proposal for Building Skills Partnership (BSP) in the amount of \$336,000 to train 350 trainees. BSP is a statewide non-profit collaboration between the Service Employees International Union-United Service Workers West Local 187, building service employers and community leaders. This particular project will continue ADVANCE Workplace Training and expand GJEP statewide. They are requesting a modification in Job Number 1. BSP is also requesting that the literacy skills cap be increased to 50%.

Mr. Griffin introduced Aida Barraga, Executive Director.

Mr. Rodriguez asked how many employers are in partnership with BSP. Ms. Barragan said that there are close to 80; about a dozen are leaders in density. Mr. Rodriguez asked if they have seen multiple consolidations of the janitorial industry by the employer in last five years. Ms. Barragan said that she has seen multiple changes since 1987. Mr. Rodriguez asked if there are any concerns about consolidation in the industry by larger employers that they may be pushing out women-owned business. Ms. Barraga said that they work with partnerships under the collective bargaining agreement; we still see diversity, one of their partners is women-owned, that is something that fluctuates. Ms. Roberts asked about vampire energy. The certification of janitors is a great program. I'm looking at the wages and we talked about modification. \$9.75 an hour for someone who is certified seems lower than other counties. You mentioned that you offer benefits; if your trainee is making \$15 an hour and they're paying \$6 for a benefit, that's a 45% benefit package. Is this correct? Ms. Barragan said yes, including the folks that are making \$9.75. These are workers that are covered under the collective bargaining agreements. Each city and area has its own history. Orange County for example, under the collective bargaining, the starting point for them was part-time work with

no benefits. Through attrition, that was converted, and part of that campaign was to convert from a part-time to a full-time workforce, and workers are excited to have family health insurance. When we negotiated the contracts, they decided to put money towards insurance before wages. It's something that has been negotiated; that's the standard for that industry. That's why you see several differences in different areas.

Ms. Roberts said that we are seeing a lot of companies that lower the wage instead of increase the benefits. Mr. Broad said that it's pretty common in the unionized sector, what happens is that, what people really want is affordable family health care, but it isn't available because it's costly. Every dollar available goes to health care instead of wages, that's part of the problem.

Mr. Rodriguez asked if 50% of the workforce are women. Ms. Barragan said yes. She also said that in the last collective bargaining agreement, a wage increase was foregone because of the rising cost in healthcare.

There were no questions from the Panel Members.

ACTION: Ms. Roberts moved and Ms. Roberts seconded approval of the Proposal Building Skills Partnership for the amount of \$336,000

Motion carried, 7 – 0.

Technology Council of Southern California (presented out-of order)

Mr. Griffin presented a Proposal for Technology Council of Southern California (TCOSC), in the amount of \$649,865. TCOSC is a non-profit, volunteer-driven organization providing events, connections, information and resources to technology companies. TCOSC develops content-driven programs that encourage interactive discussions between employers, researchers and venture capitalists. Its two flagship events, VentureNet and the annual Industry Awards, are regarded as among the most influential technology events in the region. Its members are in the technology industry sectors with operations in Greater Los Angeles and Silicon Valley. TCOSC is committed to developing the critical skills of Information Technology (IT) workers to meet the constantly evolving demands of the companies in its membership.

Mr. Griffin introduced Feyzi Fatehi, CEO and Board Member and AK Thakore, representing Saisoft.

Mr. Broad asked about Mr. Fatehi's company. Mr. Fatehi said his company is Corent Technology. It's basically creating the next chapter for cloud computing. You take any existing software and our software transforms it into a "cloud" software within days, not years, and then the cost of delivering that software drops by about 90%. Mr. Fatehi said the cloud is moving from computers to computing; moving from generators to just subscribing to power and getting the power; the same analogy: getting the computing power versus worrying about the computers that generate that power. Mr. Broad said, so in real life, all this data that we as consumers have, that is stored in the cloud, is in some server somewhere, correct? Mr.

Fatehi said yes, hopefully with a nice backup. Cloud computing is about storage, computing and network.

Mr. Broad had some questions for AK Thakore, representing Saisoft. I've come to the conclusion that there is something in your model that raises questions, because what you are doing that is different, as I understand it, you are administering these programs and connecting with the entity and providing the entity; you are doing everything. So you are similar to a private version of what a community college does, except you do it with multiple organizations, is that a fair description? Mr. Thakore agreed. Mr. Broad said, I don't have a fundamental problem with your business model, but I do feel like we need to be committed to some kind of equity, and it needs to be fair. If you were a community college and you were doing this, we'd be telling you that you could come to the Panel once a year.

Mr. Broad asked, if you are providing the training and you are getting administrative costs for doing this, would it be fair to say that at some level we are paying your left hand to supervise your right hand? In your model, the entity Technology Counsel of CA, what it brings to the table are its members. They provide you access to their members, and they get a portion of this contract to be that liaison to those members when you run an association. You're providing the training, so we are reimbursing you for training all of these workers. Then we are giving administrative costs not only to them, and they are not providing any of the training, and probably not doing all that much administering. It's not like a community college where they are in charge of the payroll of all the people that are doing all of the training and they literally have of the overhead of a community college; they own the building, pay everyone, and those are the people that provide the training and materials; so you are doing that instead, and we are paying you a fee to do the training, which includes the overhead of the entity doing the training. That is typically what our fee is. Then we are paying you a fee to administer this program. Now we are paying a lot of people fees to administer programs, and in my mind when I raise the following question, it could be raised about MECs in general or apprenticeship programs, or marketing relationships that we have. But there are other limits that we place on them, that specifically, more recently, that they can only return once a calendar year per entity. I'm concerned that you get to come back an unlimited number of times every year similar to a MEC and I want to ensure it is fair. I am wondering whether your left hand administrator is telling your right hand, you need to make sure that everyone that comes to class completes forms, and the guy receiving that information says, yes, we will do that and we are paying you to have that communication, except it's with yourself. The question is whether it would be fair to say, you don't get reimbursed, if you provide administration and the training at the same time in this model, and you are coming back over and over again. Is it fair for us to have that conversation with yourself. That's the question; what do we get for that piece of it?

Mr. Thakore said the cost break-down as explained in the application; it consists of training and administration. The administration is done by Technology Counsel as well as by Saisoft.

Mr. Fatehi said I understand your point. For Technology Counsel, we provide significant marketing and have approximately 40 major events per year and it takes much time and energy to bring these CEOs and CTO's together, and to promote this ETP program, we are using social media and also calling our members to educate them about ETP and ask them to administrate and delivering training.

Mr. Broad said that is Mr. Fatehi's part of it, but what is Mr. Thakore's part? Mr. Thakore said in the administration part of it, our responsibility is dealing with each and every employer, educating them on all the people starting with the needs assessment forms, the 100E certification, as well as all the forms that the trainees need to fill out. We still need them to fill out the ETP Form 104 because we need that in case of an audit, as a release from the trainees to be able to go back to the employer of record and obtain their proof of wages and proof of working past the retention date, so these include the things we do as part of our administration. The Counsel does not get into the nitty-gritty of what I described.

Mr. Broad said let me ask you this question about your competitors. There are other consultants in this room, and they get paid to help administer these contracts, but they don't provide the training itself. So they are obviously earning that money. I'm not sure we've actually thought about what everybody does for what they earn and literally what they are doing for that money, but aside from that, they have an arms-length relationship with the entity doing the training. So they are kind of a quality-control and accountability section of this contract. They are making sure that the employer knows what they are doing and to keep them from falling off the cliff with 22% performance; that is what we expect that they are going to do. They are making sure, obviously, that the people are showing up and filling out forms. But when you are doing both of those functions, the question in my mind is, are we paying for someone to engage in the disciplinary process and the accountability process over themselves, and is that something that taxpayers should pay for? That's the question. Mr. Thakore said in terms of accountability, I'll let Fayzee address what oversight and accountability they have over Saisoft. Mr. Broad said, no I'm talking about what you get compensated for; your portion of this; what are you doing for that, that you wouldn't be doing anyway if you are just the trainer. Mr. Thakore said the administrative fees are the tasks I mentioned earlier, which do not include any training whatsoever, so the training fees are purely for providing the training.

Mr. Broad asked ETP staff about our training fees. Do they include any administration or is it literally compensating someone from the moment they arrive, hold forth however they are going to hold forth in an educational way and lead, and there is nothing regarding accountability, filling out forms, or any administration at all. Mr. Knox said, typically administration is for that portion. What I'm hearing is that the company or the broker model is really looking at doing the support costs; it sounds like you are doing more outreach and less of the management side of it; sounds like Saisoft is doing more the management for 13%. Mr. Fayzee said we do the oversight because we are the entity, you are entrusting us, we have the oversight, and according to the governing body we are compliant with every rule and regulation that is on the book. We want to make sure our reputation after 25 years, building the brand of Technology Counsel, is on the line. Basically compliance with regulations and with our rules is our goal.

Mr. Broad said I'm not going to deal with any of this with your contract today or any of your contracts today, but I would like to direct the staff to really take a look at, and make recommendations for the upcoming FY, but I don't want to be paying twice for the same thing. I want a review of what we pay for in terms of support costs and administrative costs and if we are in this model, or in any other model, whether it's a MEC, a community college, an apprenticeship program, are we building in too much of a percentage. The percentage

has changed, the allocation has changed, because I think what happens in your broker model, which is, I think you are the only one doing it, but the model you have chosen seems to highlight every one of these issues related to MECs. It doesn't seem to come up quite as much with single employers. There is much that is different; we pay for a lot of training, for example, that is not mandated for employers. It is people getting the training that they like with the permission of their employer, but their employer doesn't necessarily get to say that it's mandatory and you are doing it on your own free time. You have employers that are basically getting the benefit of this training, but are not paying people to attend, paying them their salary to attend, because it's voluntary. The whole area has some concern for me and that's why it keeps coming up over and over again. So I would like staff to take a look at this and leave it alone, until staff comes back with recommendations to the Panel.

Mr. Thakore said, Mr. Chair, with your point about Saisoft coming back under multiple contractors, that is a fact. The numbers are something like this. According to the Bureau of Labor Statistics in the State of CA, there are 347,000 IT workers so there is a huge demand and that is a single factor that explains why you see Saisoft come back so often. Mr. Broad said right, but you are back before the Panel and getting most of this \$600,000 and most of these consultants are getting a fraction of that. So you are coming back multiple times with very large contracts, so you personally are collecting millions of dollars from us per year. That's also a little concerning, I don't know if there's a problem with it, but it's kind of unique to your model and I think it's another thing that gives us a little pause.

Ms. Roberts said, if MEC's keep coming back, as I look at your infrastructure to support that training, and it's just your wife and your kids, how can we support this? Mr. Rodriguez asked Mr. Thakore how many employees they currently have. Mr. Thakore said 4 full time employees; I have a roster of trainers that I employ when the need arises of about 60 trainers that I use. The trainers have their own corporations in most of the cases, and don't have any 1099 contractors. Mr. Rodriguez asked Mr. Fatehi how instructors are contracted. Mr. Fatehi said that Saisoft enters into a service contract with these corporations for services provided and contracts with 60. Mr. Rodriguez asked, if what ETP funds is part of the blend of contracting with these instructors. Mr. Fatehi said in the training industry, it is not feasible to have FT employees. Mr. Rodriguez asked ETP staff, if the application, does it include the entity by which he has a service agreement that is utilizing ETP funds? Ms. Reilly we don't routinely check the subcontract. The subcontractors are not a party, so don't review subcontracts, we stop at that point. Mr. Rodriguez asked if we look at the contracts and put them in the file? Ms. Reilly said, we routinely ask for a copy of the subcontract agreement between our contractor and their vendor or consultant; we review them. We will start requesting them for legal review with MEC's. It is built in our contract that we have a right to ask and receive a copy of the contract. Mr. Rodriguez asked what percent is self-directed learning versus instructor based guided learning. Mr. Fatehi said that it is all 100% instructed led training.

Ms. Roberts asked where in California their instructors located at. Mr. Thakore said 65-70% are California based, the rest are located throughout the country; Canada and Costa Rica. Ms. Roberts asked Mr. Thakore if any of the instructors come from the companies he has contract to train with. Mr. Fatehi said no. That would be a conflict of interest. Ms. Bell asked how many of instructors are off shore. Mr. Fatehi said that in the event that one of my U.S. base instructors isn't available, then I resort to utilizing either 2 Canada or 1 Costa Rica, but that is on an exception basis.

ACTION: Ms. Roberts moved and Mr. Broad seconded approval of the Proposal for Technology Council of Southern California in the amount of \$649, 865.

Motion carried: 5 - 1 - 1. (Gloria Bell opposed and Sam Rodriguez abstained.)

Southern California Sheet Metal Joint Apprenticeship & Training Committee

Mr. Griffin presented a Proposal for Southern California Sheet Metal Joint Apprenticeship (SoCal Sheet Metal) & Training Committee in the amount of \$448,448. The (SoCal Sheet Metal) trust fund was formed in October 2003, as a result of the merger between two trust funds serving two separate apprenticeship programs: 1) Sheet Metal Workers' International Association, Local Union 105 JATC and 2) Air Conditioning Sheet Metal Association, Orange Empire SMACNA JATC.

Mr. Griffin introduces Lance Clark, Administrator and Oscar Mayer of the Los Angeles School District, and Steve Duscha, Consultant.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of Proposal for Southern California Sheet Metal Joint Apprenticeship & Training Committee in the amount of \$448,448

Motion carried, 7 – 0.

Tech Serve Alliance – So Cal Chapter, Inc.

Mr. Griffin presented a Proposal for Tech Serve Alliance – So Cal Chapter, Inc. for the amount of \$646,865. TSA is an all-volunteer organization providing Information Technology (IT) and Engineering solutions to Technology companies, consultants and suppliers throughout California.

Mr. Griffin introduces Felix Lin, President, and AK Thakore, Saisoft.

Mr. Broad said, this gets to the edge our policy concerns in a variety of ways; we struggle to come to the conclusion that this is not an issue. Our job is to protect the integrity of the program

Ms. Roberts said I would like to get a feedback from the people that are enrolled in the training. These are some of the issues that are in question. Mr. Lin said that if he felt that Mr. Thakore wasn't doing a good job, he would find another training partner. We stand behind Mr. Thakore.

Mr. Rodriguez asked Mr. Felix if the TSA is a nonprofit and all volunteer organization. Can you give me a brief history of the Company? Mr. Lin said that TSA is a national organization that was built upon local chapters. We provide technology and engineering staffing; we've been around since 1987. We have 15 direct companies in the So-Cal area that serve California. We don't train, we find talent.

ACTION: Ms. Roberts moved and Mr. Broad seconded approval of the Proposal for Technology Council of Southern California in the amount of \$649, 865.

Motion carried: 5 – 1 - 1. (Gloria Bell opposed and Sam Rodriguez abstained)

Feather River College

Mr. Atkinson presented a Proposal for Feather River College in the amount of \$106,398. Feather River College (FRC) is a 2 year community college, accredited by the Accrediting Commission for Community Junior Colleges (ACCJC) of the Western Association of Schools and Colleges (WASC). FRC offers general education classes to the local community. Mr. Atkinson introduced Mike Snead, Consultant – Sierra Consulting, Leah Goolds-Haws, Deputy Sector Navigator.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of Proposal for Feather River College in the amount of \$106,398.

Motion carried, 7 – 0.

Feather River College RESPOND

Mr. Atkinson presented a Proposal for Feather River College RESOND in the amount of \$117,520. Feather River College (FRC) is a two-year community college and is accredited by the Accrediting Commission for Community Junior Colleges of the Western Association of Schools and Colleges.

ACTION: Ms. Bell moved and Ms. Roberts seconded approval of Proposal for Feather River College in the amount of \$106,398.

Motion carried, 7 – 0.

UFCW Northern California Meat

Mr. Atkinson presented a Proposal for UFCW Northern California Meat in the amount of \$125,100. The UFCW Northern California Meat Apprenticeship Trust Fund (UFCW Meat Trust) seeks training funds for 45 apprentices in the retail and wholesale meat cutting industry. Apprentice training has been offered in California by the United Food and Commercial Workers (UFCW) for 75 years in this industry sector.

Mr. Atkinson presented Jaime Cortez, Local 5 Representative/Apprenticeship Coordinator and John Buena, Director Meat Trust.

Mr. Broad asked if the Safeway merger/sale is going to affect this contract. Mr. Buena said they are under contract. Ms. Roberts asked if Mr. Buena had any experience with the ETP program, will you be doing this on your own. Mr. Buena said yes.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of Proposal for UFCW Northern California Meat in the amount of \$125,100.

Motion carried, 6 – 0. (Sam Rodriguez abstained)

IX. Funding Priorities FY 2015/16

Stewart Knox, Executive Director, gave a summary of Total Budget Project funded in the past three years. For FY 12/13 we funded \$66M; \$65M for FY 13/14, and \$94M for FY 14/15. In terms of numbers projects approved, 352 for FY 12/13, 301 for FY 13/14, and 438 for FY 14/15. Number of trainees: 68,000 for FY 12/13; 62,000 for FY 13/14, and 69,000 for FY 14/15.

Mr. Knox revisited the ETP funding strategies for Multiple Employer contracts, single Employers and Small Business. We are also looking at ways to encourage the small businesses to move into MECS; and these are Critical Proposals and Apprenticeship programs and some additional non-traditional outreach. We will look at how to allocate funds based on historical demand of these categories.

Going back to the strategies, current and modified priorities include the following industries: manufacturing, food production, biotechnology, life sciences, information technology services, multi-media and entertainment, goods movement and transportation logistics, allied healthcare and construction-green-clean technologies. These are in alignment with Workforce Investment Board.

From our last meeting, we've touched on special populations, high speed rail and job creation. Job creation is still one of our key components. We added the training that leads to industry recognized credentials after the last Panel Meeting.

Continuing on the topic of strategies, we will develop a "simple" way to work through proposals in the FY 15/16 year to determine funding within each category. Instead of the first in first out model, we will look at the how do they fit against the priorities, the Panel's priority industries, the Governor's priorities and special populations. My recommendation is keep it simple.

In regard to funding release, I recommend a staggered release date of 15/16 funds. My first recommendation is to release funds in on April 1, 2015 for MEC's and Apprenticeship Programs. My second recommendation would be Single Employers in May and Small business in June. We need to allow staff the time to finish this year's backlog of contracts; we have 97-98 projects left in this FY and most of those are in the Regional Offices. Funding should not be released all at one time; we don't want to panic or create what we had happened in the past where we had to stop the funding flow. Lastly, I recommend restoring caps to higher levels.

Looking at proposed funding allocations, what we have is allocation by category. For Single Employer \$44,300,000; MECs \$19,782,779, Small Business \$6,500,000, Critical Proposals \$7,840,000, and Apprenticeship/non-traditional \$12,078,779; total \$90,501,558 This is the continuation of the 38% encumbrance level.

Concerning funding caps, for MECS in 13/14, the caps were at \$1.25M, it was reduced to \$650,000 in FY 14/15, and for this year, we are recommending an increase to \$950M for the current year. For FY 15/16 we propose the following: for MEC's serving the small business segment, we recommend increasing the funds to \$1.2M, Small Employers, \$750,000, Small business, \$50,000, Critical Proposals, \$900,000, Apprenticeship per sponsor \$450,000 which takes us back to their historical level. This was the height of the job creation components. Again, you can make recommendations if you want to add more money to Small Employers with a job creation. We are moving the projects very well.

Mr. Broad asked about the MEC's serving small business; is the process to encourage the small businesses to go through MEC's instead of going through the regular application process with the small business? Mr. Knox said yes. In the past, we've had a lot of small businesses that come to the Panel, which is fine, but they are staff intensive. Our recommendation is to get them pushed those out to WIBs and community colleges. If the small businesses call in to us, and they are from the regions without the MEC, we would take them on. If there is a MEC within their region, we would refer them out. We wouldn't stop them from coming to us, we will service them if they decide to come forward and apply through the small business application. If they want to go through our process, through the delegation process, that's completely acceptable and perfectly fine. If a small employer wants to customize training on specific skills, we could refer them to the community college that has a MEC, we would encourage the small business to give them a call. If that doesn't work out for them, they can come back to us. We also need to work with staff and make sure that the hand-off to MEC goes swiftly. Mr. Broad said that he's concerned that the small business might not be able to get exactly what they want from the community college or MEC. We should have the staff inquiry about what kind of specific training they're looking for. We need to make sure that we're referring them out to the specific MEC that will fit their needs.

Ms. Reilly said that a vast majority of small businesses are served through MECS presently and have been for many years. That's where we really do our most effective outreach to this population.

Ms. Roberts said that her concern with this recommendation, is that small businesses would be underserved if we forward them all to the MEC's. Are our small business properly served, do they feel comfortable with this process? Our MEC's do a great job, I just want to make sure that everyone gets an opportunity to come to the table. Mr. Knox said that if the small business chose to go through us, we will welcome them.

X. PUBLIC COMMENTS

Annie Rafferty, Director of Contract Education, Butte College

Ms. Rafferty said she is very appreciative of the Panel's efforts for our employers and as a member of our new community MEC task force.

Dr. John Tillquist, Associate Vice Chancellor, Economic Development Riverside Community College District

He said that Community Colleges aren't here to make money; they're here to serve the community and businesses.

Robert Lebeck, San Bernardino Community College District, Director of Workforce Development.

We respond to the unique needs of each employer, I don't have a standard curriculum. When I'm contacted by an employer, I send out an instructor to their location to find out exactly what their needs are, and we customize the curriculum to their needs. We will do the same thing with the small business component.

Kim Holland, Glendale Community College, Professional Development Center

We have been doing ETP training for 30 years. Yesterday with the city of Glendale, the Mayor presented us with the Community Partner of Year Award. I'm here to let you know that we do serve the small businesses in our area.

Sandra Sisco, Technical Assistance, Contract Education for California Community College

My role is to support every California Community College in their contract education efforts. Ms. Sisco said that the 112 Community Colleges across the State of CA are a great infrastructure and a backbone to continue the great partnership that we already have with ETP. We're open to working with ETP in continuing to serve the business industry.

Eldon Davidson, Community College MEC

He said there's confusion between the role of the Chancellor and the MEC's representative roll; ultimately we answer to ETP and the chancellors are the cheer leaders. We work with each other. He presented an annual report to the Panel. Want to show the impact we have. On the 2013 annual report, 12,300 individuals served. We earned \$11.4M and our success rate is 84%. Based on Community College MECs demographic data based on participating colleges, we are serving 46% small businesses and 54% large businesses. The average wage survey is \$27.28. There are different sides to academic colleges; there's the academic side and then there's the contract side. We customize everything; from our side we're serving 46% on average small business; as we can do even more. We have a 90% completion rate.

If you look at the map of California on the handout, we do partner with each other for the different purposes. We share instructors and curriculum. The handout shows California's priority sectors, it shows ETP's Top Sector Priorities. If you look at that and how they line up with the Community Colleges, it's almost dead on. Community Colleges Top Sector Priorities includes manufacturing, goods movement and transportation logistics, agriculture, green/clean technology, construction, allied healthcare, information technology services, biotechnology and life sciences, multi-media entertainment; we're here to serve.

Mr. Broad said that customized training is better than non-customized training. That is what we want to pay for; to get the people to take the time to make it really worth it. Mr. Davidson said we understand these are small businesses within in own communities. We know that not serving them would have an effect in our community. He told Mr. Knox that they read his plan and fully support it.

Thom Akeman, Consultant – Duscha Advisories

Steve can't be here today, but he asked me to represent him on his behalf. He wants to express his support for the Executive Director's proposals. He said in his view, these are timely and they are sound ways to advance ETP programs, and progresses the way it should be.

Nick Loret Demolle, California Workforce Association

The CA Workforce Association is a long-time multiple employer contract holder with the Panel and one in very good standing. We support a robust approach with small business outreach by this Panel. We would like to offer our services in expanding that outreach, as a statewide organization that represents all 49 local workforce boards in the State.

Barry Broad, Panel Chair

I have to interrupt you; we have an issue which is two of us have to leave including me. I want a show of hands of everyone in line for Public Comment, who likes the proposal and who has an issue with it? Is anyone opposed to it? There was no opposition by the public. I wanted to ensure we still had a Panel quorum, as two of us have to leave now.

Nick Loret Demolle, California Workforce Association (continued)

We have spoken with staff and would like to develop a regional method to a statewide program of employer outreach through the WIBs and hopefully get them to get their own contracts down the road through this program.

Barry Broad

Mr. Rodriguez is going to make a motion to approve the Executive Director's report. Mr. Rodriguez said yes, motion to approve. Mr. Broad said and I second that motion. I will hand the gavel over to Vice Chair Roberts for the remainder of the meeting. That motion is on the table, and we are going to open the roll call for the two of us to vote. Mr. Rodriguez, what is your vote? Aye. Mr. Broad said my vote is also aye, and then the rest of the Panel can listen to the remainder with our apologies and then you can conclude the roll call.

John Brauer, Executive Director for Workforce Development of the CA Labor Federation

We also wanted to reiterate our support for the Executive Director's recommendations here today, in terms of the funding amounts and caps. In addition to that, I understanding where you have taken ETP over the last year to stabilize ETP, its processes, and to deal with getting staff positions filled and get some stability. We would still like to engage ETP in meeting with the Labor Federation, our affiliates, and the State Building Trades, around the recommendations we made to you last fall in terms of apprenticeship going forward, hopefully, for the 2016-17 FY. A couple of things; one was we had brought a recommendation for having some percentage of your annual allocation being tied to maybe a once a year application process and a twice a year review process relative to apprenticeship, to help our apprenticeship programs, and ETP to have a predictable process relative to that, that we could work with the other stakeholders in that regard, and that may make some sense going forward, both in terms of construction, but also given the Governor's mandate and support for other non-traditional apprenticeship that's going to be coming forward. We have some recommendations around performance, wage rates above and beyond even your SET for priority minimum wages that we think should be tied to public project wages and things like that, that we would like to have a discussion with you about. Other simple point

likewise, is that we would like to continue to talk to you about the nature of those apprentice programs. Well over 60% of the businesses that are represented with our apprentice programs are small business. So aside from the MECs and your large individual contractors, our individual NECA members and other folks are frankly small businesses within that consortium. And we like the argument made by the community colleges. Also our training, those joint-apprenticeship programs, the labor management partnerships are doing on-demand training. We would like to have that conversation with you and maybe if we could get to having those conversations with you sooner rather than later, you all could pilot, for instance, having your pre-application process starting in the Fall or Winter this year, and as you know what your annual total is going to be, you could be having at this point next year, recommendations about how many apprentices you are going to be training in that FY and dividing up that pie by the number of the apprenticeship programs, but we would like to have that discussion. We brought those recommendations, we totally understand what Mr. Knox and staff have brought forward, and we support it in going forward. There are other issues too that I think will be coming up. We are working with a wide variety of both union and non-union employers, community colleges around for instance, a manufacturing proposal that hopefully will go forward to DOL. The apprenticeship duration, and also for some of the other non-traditional apprenticeship programs we are trying to support, are shorter than the four or five year apprentice programs lengths that we see in our construction stuff. So, down the line considering whether you would fund first-year apprentices in those new or non-traditional programs we would like to have that discussion with you as this grows and emerges and we think both because of the federal government support and also the mandate coming from the Governor, that it's going to be worthwhile for ETP to figure out both the construction part and non-traditional apprenticeship part in going forward.

Rob Sanger, California Manufacturers and Technology Association

I just wanted to give our support for this proposal, it's very strong. Of course, we'll have some questions in the details but overall, it looks like a very strong proposal, and it's exciting to go into a new funding year with strong funding. Also, I've been encouraged by talking to some of the new-hire ETP staff from Sacramento, I've met with some of them that have been working on my projects, and they seem like really good hires. I met yesterday in Orange County with some of the San Diego and North Hollywood staff, and took the tour of one of the employers that we're working with, and they seem really sharp as well. I think everyone is very excited about this New Year and I think the morale is good at ETP, and that makes our morale good in consulting. So thanks for your assistance with all of that Mr. Knox, and we look forward to that. As far as the referrals to the MECs for the small businesses, and I think I mentioned this briefly last time, but there is already a sort of process in place, as they are kind of doing this already, as far as looking at the employer coming into the system and then trying to find the best fit; so I don't think it's going to be too big of a stretch for them to do it, but as you can see on the Panel today, the small business projects have some \$7,000 to \$9,000 projects. It takes a lot of time to develop one of those projects, and so something like that would probably be a good fit for a MEC.

Phil Herrera, Herrera & Company

I did want to give a shout out to the Critical Proposals section. My experience in working with Critical Proposals, they include some of the Governor's initiatives, in CA Competes application as well, so I wanted to let you know it was very well received even though ETP is not part of that pitch. Are we eliminating the High Earner Reduction (HER)? Ms. Roberts

said we didn't talk about that Mr. Knox, did we? Mr. Knox said we have not had that conversation yet. Ms. Reilly said, we probably just need to roll that forward and I don't think there was an intention to eliminate. Mr. Knox said yes, I agree. Mr. Herrera said it would be capped at \$750,000 for single employers. Mr. Knox said it's still under the single employer, yes.

Mr. Knox said I want to amend the recommendations then, that small business will go in May. Ms. Roberts said, so small business and single employer will go at the same time. Ms. Reilly asked, are we then including in the motion, to continue the High Earner Reduction that's in effect for the current FY rolling it forward to the next FY. Ms. Roberts said it's something we haven't talked about. Ms. Reilly said, or do you want a separate recommendation? Mr. Knox said no, we are moving forward.

ACTION: Mr. Rendon moved and Ms. Bell seconded approval of the Funding Priorities for FY 2015-16.

Motion carried, 7 – 0 (Mr. Broad and Mr. Rodriguez voted in favor of the motion prior to departing the meeting during Public Comment).

XI. MEETING ADJOURNMENT

ACTION: Ms. Roberts moved and Ms. Bell seconded meeting adjournment at 1:13 p.m.

Motion carried, 5 – 0.

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 \$425,000 (no variations).

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 \$650,000.

Retraining

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

New Hire Training

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

These features apply to core program funding.

Delegation Order Process

- The Panel has delegated authority to the Executive Director, without consultation with the Panel Chair, to approve (1) small business (100 or fewer employees) for \$50,000 or less, and (2) single and multiple employer proposals for \$100,000 or less.
- This procedure allows projects to be approved on a flow basis. This process recognizes the need for just-in-time training, and reduces or eliminates the need for a Consent Calendar.
- An ETP130 and Curriculum is prepared for each proposal. They are reviewed and approved after the Executive Director signs off. The effective date will be the date specified by the Field Analyst and if no date is specified, the earliest effective date of contract is the day after the project is approved by the Executive Director.
- A copy of approved Delegation Orders is included in each month's Panel Packet, for projects approved prior to the Panel meeting, as an information item.



M e m o r a n d u m

To: Panel Members

Date: April 24, 2015

From: Stewart Knox, Executive Director

File:

Subject: LEGISLATIVE UPDATE

1. The following bills have been introduced in the 2015-16 legislative session that have a potential or direct impact on the Employment Training Panel (ETP) program:

SB 69 and AB 103 - Budget Act of 2015

(Senator Mark Leno and Assembly Member Shirley Weber)

SUMMARY: Both Senate Bill 69 and Assembly Bill 103 would make appropriations for the support of state government for the 2015-16 Fiscal Year. In terms of the Employment Training Panel's appropriation, both bills are identical.

As introduced, each bill would increase ETP's appropriation in Fiscal Year 2015-16 by \$10 million over what was initially appropriated for Fiscal Year 2014-15, in order to address increasing demand for training contracts.

STATUS: Both bills were introduced on January 9, 2015. Senate Bill 69 was read for the first time on January 12, 2015, and AB 103 was referred to the Assembly Committee on Budget on January 26, 2015.

2. The following bill has been introduced in the 2015-16 session that may have a potential impact on the ETP program, or that may be of interest to the Panel:

SB 3 – Minimum wage: adjustment

(Senator Mark Leno)

SUMMARY: Existing law requires that, on and after July 1, 2014, the minimum wage for all industries be not less than \$9 per hour. Existing law further increases the minimum wage, on and after January 1, 2016, to not less than \$10 per hour.

As amended on March 11, 2015, this bill would increase the minimum wage on and after January 1, 2016, to not less than \$11 per hour, and on and after July 1, 2017, to not less than \$13 per hour. The bill would require, commencing January 1, 2019, the

annual automatic adjustment of the minimum wage to maintain employee purchasing power diminished by the rate of inflation during the previous year.

The adjustment would be calculated using the California Consumer Price Index, as specified. Further, the bill would prohibit the Industrial Welfare Commission from reducing the minimum wage and from adjusting the minimum wage if the average percentage of inflation for the previous year was negative.

STATUS: On April 8, 2015, SB 3 was read a third time in the Senate Committee on Labor and Industrial Relations. It passed out of Committee and was re-referred to the Committee on Appropriations.

CALENDAR: SB 3 was placed in the suspense file after being heard in Senate Appropriations on April 20th.

**Fund Status Report
Fiscal Year 2014-15**

APRIL 2015 - Panel Meeting

	FY-14-15
Employment Training Fund	73,193,000 *
Other ETF Appropriation	
Tax Collections Branch	(5,561,000)
Fiscal	(42,000)
Employment Training Panel Appropriation	67,590,000
Disencumbered Funds Re-Invested	3,883,914
Amount Available Fiscal Year 2014-15	71,473,914
Program Administration	(9,500,000)
EDD Support	(701,500)
Marketing & Research	(300,000)
Pro Rata - Program 50	(648,462)
Employment Training Management System	(482,496)
Prior Year Contract Liabilities	(27,000,000)
Training Funds Available	32,841,456
Projected Contracting Capacity @ 38% Encumbrance Level	86,424,884
	Contract Amount Amount Encumbered
Funds Committed To Date **	69,071,673 28,157,668
Projects to Panel - April 2015	4,311,245 1,638,278
Remaining Balance Available	3,045,511
Remaining Contracting Capacity for the Fiscal Year 14-15	13,041,966
Non-ETF Funds	
California Energy Commission - AB 118	3,000,000
Administration Cost	(150,000)
Possible Training Funds Available	2,850,000
	Contract Amount Amount Encumbered
Funds Committed to Date	711,560 711,560
Projects to Panel - April 2015	0 0
Remaining Balance Available	2,138,440
RESPOND (Drought Funds)	2,000,000
	Contract Amount Amount Encumbered
Funds Committed to Date	1,871,980 1,871,980
Projects to Panel - April 2015	0 0
Remaining Balance Available	128,020

* Per AB 1476, Budget Act Amendment which increased ETF Appropriation by \$10 Million

** Funds Committed to Date includes projects approved via Delegation Order

4/21/2015



Amendment Proposal #1 for:
Glendale Community College
Professional Development Center
Agreement Number: ET15-0224

Panel Meeting of: April 24, 2015

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

CURRENT PROJECT PROFILE

Contract Type:	Retrainee Priority SB <100 HUA	Industry Sector(s):	Manufacturing Aerospace and Defense Services
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 United Steel Workers of America Loc. 560	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Current Contract Term: September 2, 2014 to September 1, 2016

Current Funding	In-Kind Contribution
\$374,764	\$487,194

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
+\$256,148	+\$17,754	+\$273,902	+\$212,675

Total Funding
\$648,666

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Adv. Technology; Computer Skills; Continuous Impr.	22	8-200	0	\$802	\$14.90
				Weighted Avg: 50			
2	Priority Retrainee	Adv. Technology; Computer Skills; Continuous Impr.	258	8-200	0	\$1,001	\$14.90
				Weighted Avg: 52			
6	Priority SB<100	Adv. Technology; Computer Skills; Continuous Impr.	212	8-60	0	\$1,390	\$14.90
				Weighted Avg: 50			
7	Retrainee SB<100	Adv. Technology; Computer Skills; Continuous Impr.	44	8-60	0	\$1,176	\$14.90
				Weighted Avg: 50			

Minimum Wage by County: \$16.04 for Los Angeles County; \$15.98 for Orange County; \$15.60 for San Diego County; and \$14.90 for Ventura, Kern, Riverside & San Bernardino Counties.

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

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

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

Wage Range by Occupation	
Occupation Title	Wage Range
Administrative/Support Staff	
Customer Service Staff	
Engineer/Designer I	
Engineer/Designer II	
Finance/Accounting Staff	
Inspector I	
Inspector II	
Machine Operator/CNC Specialist I	
Machine Operator/CNC Specialist II	
Manufacturing/Production Staff I	
Manufacturing/Production Staff II	
Material Handler/Operator	
Technician	
Warehouse Logistics Staff	
Supervisor	
Manager	
Owner (Small Business – Job Numbers 6 -7 only)	

INTRODUCTION

Founded in 1927, Glendale Community College Professional Development Center (GCC) (www.pdcofgcc.com), provides customized, job-specific training for businesses and workers. GCC has trained more than 36,000 workers from 4,800 Southern California employers during its 30-year history of funding through ETP. GCC reports that 82% of participants were small business employers, and overall 96% in priority industries.

This proposal was originally presented to the Panel on July 25, 2014 in the amount of \$749,853. In consideration of ETP Fiscal Year 2014/2015 funding constraints, the Panel held the proposal until August and then cut the amount of funding to half of the original request. The Panel took this same action with other Multiple Employer Contract (MEC) proposals. [Note: Two other similarly situated MECs are asking for restoration of funds this month; Kern Community College District and Studio Arts, Inc. All three Amendment proposals are on the Consent Calendar based on the Panel's instruction in January.]

The Panel stated they would allow the MECs to return this Fiscal Year for the remaining funding up to the maximum cap of \$750,000, so long as they would show performance of at least 70%.

AMENDMENT DETAILS

Based on the current data on the ETP Online Tracking System, GCC has delivered hours sufficient to show performance of 73%. GCC is requesting to restore \$273,902 in funds, which is less than half of the original request. The additional funds will be used to accommodate participating employers who were not included in the initial phase of this Agreement, and reflects actual demand at this stage of the contract term. [Note: Support Costs of 8% will also be applied.]

This Amendment will increase the amount of funding by \$273,902, from \$374,764 to \$648,666, and average number of trainees by 236, from 324 to 560. There will be no change to the curriculum or trainee wages.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET15-0224	\$374,764	09/02/14 – 09/01/16	324	266	40

Based on ETP Systems, GCC has provided 12,888 hours for a potential earning of \$273,577 (73% of the Agreement amount).



Amendment Proposal #1 for:
Kern Community College District
Agreement Number: ET15-0246

Amendment Effective Date: April 24, 2015

Panel Meeting of: April 24, 2015

ETP Regional Office: North Hollywood

Analyst: L. Vuong

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee	Industry Sector(s):	Aerospace and Defense
	Priority/SB<100		Agriculture
	SET/HUA - Retrainee		Construction
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

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

Current Funding	In-Kind Contribution
\$374,434	\$391,755

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
\$350,880	\$24,318	\$375,198	\$391,755

Total Funding
\$749,632

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority/Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Impr., Haz. Materials, Mgmt. Skills, Mfg. Skills, OSHA 10/30	598	8-200	0	\$770	\$14.90
				Weighted Avg: 40			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Impr., Haz. Materials, Mgmt. Skills, Mfg. Skills, OSHA 10/30	40	8-200	0	\$641	\$14.90
				Weighted Avg: 40			
3	Retrainee Priority Rate SB<100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr., Haz. Materials, Mgmt. Skills, Mfg. Skills, OSHA 10/30	200	8-60	0	\$1,112	\$14.90
				Weighted Avg: 40			
4	Retrainee SB<100	Business Skills, Comm Skills, Computer Skills, Continuous Impr., Haz. Materials, Mgmt. Skills, Mfg. Skills, OSHA 10/30	20	8-60	0	\$941	\$14.90
				Weighted Avg: 40			
5	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr., Haz. Materials, Mgmt. Skills, Mfg. Skills, OSHA 10/30	26	8-200	0	\$641	\$14.90
				Weighted Avg: 40			
6	Retrainee SET SB<100 HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr., Haz. Materials, Mgmt. Skills, Mfg. Skills, OSHA 10/30	6	8-60	0	\$940	\$14.90
				Weighted Avg: 40			

Minimum Wage by County:

Job Numbers 1, 2, 3 and 4: \$16.25 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara and Santa Cruz Counties; \$16.04 per hour for Los Angeles County; \$15.98 per hour for Orange County; \$15.60 per hour for San Diego County; \$15.59 per hour for Sacramento County; and \$14.90 per hour for all other counties.

Job Numbers 5 and 6 (SET-HUA, ETP Standard Wages): \$16.25 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara and Santa Cruz Counties; \$16.04 per hour for Los Angeles County; \$15.98 per hour for Orange County; \$15.60 per hour for San Diego County; \$15.59 per hour for Sacramento County; and \$14.90 per hour for all other counties.

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

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

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

Wage Range by Occupation	
Occupation Title	Wage Range
Production Staff, Shipping Staff, Laborer	
Maintenance	
Lead/Operator, Technician/Mechanic	
Administrative Staff	
Sales Staff, Superviso/Manager Level 1	
Sales Staff, Superviso/Manager Level 2	
Safety Professional	
Engineer Level 1	
Engineer Level 2	
Wind/Solar Technician/Maintenance Level 1	
Wind/Solar Technician/Maintenance Level 2	

INTRODUCTION

Headquartered in Bakersfield, Kern Community College District (KCCD) (www.kccd.edu) strives to provide outstanding educational programs and services that are responsive to its diverse students and communities. The District includes Bakersfield College, Cerro Coso College, and Porterville College. KCCD serve Kern, Tulare, Inyo, Mono, and San Bernardino Counties, making it of the largest districts in the United States.

This proposal was originally presented to the Panel on July 25, 2014 in the amount of \$748,868. In consideration of ETP Fiscal Year 2014/2015 funding constraints, the Panel held the proposal over until August and then cut the amount of funding to half of the original request. The Panel took this same action with seven other Multiple Employer Contractors (MEC) proposals. [Note: Two other similarly situated MECs are asking for restoration of funds this month: Glendale Community College Professional Development Center and Studio Arts, Inc. All three Amendment proposals are on the Consent Calendar based on the Panel's instruction in January.

The Panel stated they would allow the MECs to return this Fiscal Year for the remaining funding up to the maximum cap of \$750,000, so long as they would show performance of at least 70%.

AMENDMENT DETAILS

KCCD continues to providing ETP training, and participating employers are expressing the need to train more workers. Therefore, KCCD requests to restore the 50% cut in funding from August 2014. Moreover, KCCD originally requested a 12-month term of contract. In order to maximize the additional funding, the college is also asking to add four months, and extend the term end date from September 1, 2015 to January 1, 2016. There is no change in curriculum.

Based on current data in the ETP Online Tracking System, KCCD has delivered sufficient hours to show performance of 82%. KCCD anticipates completing 100% of the training hours before the last day of training. Trainees are going through an aggressive training plan, including multi-day and multi-week classes (8 hours per day, 5 days per week).

The additional funding will allow KCCD to implement its original training plan and accommodate more trainees. This Amendment will increase the Agreement amount from \$374,434 to \$749,632 and increase trainees from 443 to 890. [Note: Support Costs of 8% will be applied.]

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET15-0246	\$374,434	09/02/2014– 09/01/2015	443	110	TBD

ET15-0246: As of March 10, 2015, the ETP Contract Status Report shows that 515 trainees have been enrolled; 110 trainees completed training and are in retention; and 405 trainees are still in training. The ETP Class/Lab Tracking System shows a total of 14,314 eligible hours for potential earnings of \$307,639.09 (82% of the Agreement amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through April 30, 2015.

This table summarizes performance by KCCD under a current ETP Agreement for RESPOND (alternate funds):

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET15-1001 (RESPOND)	\$233,220	11/24/2014– 11/23/2016	156	TBD	TBD

ET15-1001 (RESPOND): Of an estimated 156 trainees, 50 have been enrolled and have received the minimum hour of training. It is too early in the contract term to project performance.



Amendment Proposal #1 for:
Studio Arts, Ltd.
Agreement Number: ET15-0248

Panel Meeting of: April 24, 2015

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

CURRENT PROJECT PROFILE

Contract
Type: Priority/Retrainee
SB<100

Industry
Sector(s): Multimedia
Entertainment

Counties
Served: Los Angeles

Repeat
Contractor: ☒ Yes ☐ No

Union(s): ☒ Yes ☐ No

Priority
Industry: ☒ Yes ☐ No

Current Contract Term: August 24, 2014 to August 23, 2016

Current Funding	In-Kind Contribution
\$374,374	\$348,168

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
+\$351,000	+\$24,375	+\$375,375	+\$351,650

Total Funding
\$749,749

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority/Retrainee	Advanced Technology	451	8-240	0	\$1,001	\$16.04
				Weighted Avg: 36			
2	Priority/SB<100	Advanced Technology	298	8-200	0	\$1,001	\$16.04
				Weighted Avg: 36			

Minimum Wage by County: \$16.04 per hour for Los Angeles County

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

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

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

Wage Range by Occupation	
Occupation Titles	Wage Range
Animator 1	
Animator 2	
Art Director 1	
Art Director 2	
Artist 1	
Artist 2	
Compositor 1	
Compositor 2	
Construction Coordinator 1	
Construction Coordinator 2	
Costume Designer 1	
Costume Designer 2	
Editor 1	
Editor 2	
Hair Stylist 1	
Hair Stylist 2	
Illustrator/Storyboard 1	
Illustrator/Storyboard 2	
Lighting Tech 1	
Lighting Tech 2	
Makeup Artist 1	

Makeup Artist 2	
Matte Artist 1	
Matte Artist 2	
Model Maker 1	
Model Maker 2	
Modeler 1	
Modeler 2	
Opaquer 1	
Opaquer 2	
Ornamental Plasterer 1	
Ornamental Plasterer 2	
Production Designer 1	
Production Designer 2	
Prop Designer (Animation) 1	
Prop Designer (Animation) 2	
Prop Maker 1	
Prop Maker 2	
Set Decorator 1	
Set Decorator 2	
Set Designer 1	
Set Designer 2	
Technical Director 1	
Technical Director 2	
Textures Artist 1	
Textures Artist 2	
Visual Development 1	
Visual Development 2	

INTRODUCTION

Studio Arts, Ltd. (Studio Arts) (www.studioarts.com) is a private training company for high-tech, computer-based software and hardware for the motion picture, television and post-production industries located in Los Angeles. Founded in 2001, the school serves motion picture and television production, visual effects, game, production design, mobile entertainment and online gaming, set design, prop-making and model-making companies in Southern California.

This proposal was originally presented to the Panel on July 25, 2014 in the amount of \$749,749. In consideration of ETP Fiscal Year 2014/2015 funding constraints, the Panel held the proposal until August and then cut the amount of funding to half of the original request. The Panel took this same action with other Multiple Employer Contract (MEC) proposals. [Note: Two other similarly situated MECs are asking for restoration of funds this month; Glendale Community College Professional Development Center and Kern Community College District. All three Amendment proposals are on the Consent Calendar based on the Panel's instruction in January.] The Panel stated they would allow the MECs to return this Fiscal Year for the

remaining funding up to the maximum cap of \$750,000, so long as they would show performance of at least 70%.

AMENDMENT DETAILS

Studio Arts has documented 75% in eligible Class/Lab training hours as reported in the ETP Online Tracking System. (See also Table below) Participating employers are demonstrating ongoing demand, due in part to the competitive nature of this industry sector.

This demand is sufficient to continue training through July 2015.

By this Amendment:

- The Agreement amount is increased by \$375,375 (from \$374,374 to \$749,749);
- The estimated number of trainees is increased by 375 (from 374 to 749); and

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET15-0248	\$374,374	8/24/2014– 8/23/2016	374	80	0

Training commenced on 08/24/14 and is ongoing for 284 trainees. An additional 60 trainees have recently completed or are about to complete training. The ETP class/lab tracking system reflects that Studio Arts has documented over 10,000 hours of eligible training hours which equates to potential earnings of approximately \$278,917 (75%).

ACTIVE PROJECTS

The following table summarizes performance under another current ETP Agreement that ends next month:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET13-0359	\$749,705	4/27/2013- 4/26/2015	473	794	374

The Contractor has placed 374 trainees with earnings of \$526,678 to date (70%). With an additional 177 pending placements, Studio Arts anticipates 99% in earnings with final invoice. This projection is supported by the fact that over 26,766 hours of training have been entered into ETP Online Tracking.



RETRAINEE - JOB CREATION

Training Proposal for:

PRN Ambulance, Inc.

Agreement Number: ET15-0428

Panel Meeting of: April 24, 2015

ETP Regional Office: North Hollywood

Analyst: E. Fuzesi

PROJECT PROFILE

Contract Attributes:	SET Job Creation Initiative HUA Priority Rate Medical Skills Training	Industry Sector(s):	Healthcare Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 254	U.S.: 254	Worldwide: 254
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$120,160		\$0	\$0		\$120,160

In-Kind Contribution:	100% of Total ETP Funding Required	\$274,600
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	SET Retrainee Job Creation Initiative Priority Rate	Continuous Impr., MST - Didactic, MST - Preceptor	38	8-200	0	\$1,460	\$13.31
				Weighted Avg: 73			
2	SET Retrainee Job Creation Initiative HUA Priority Rate MST	Continuous Impr., MST – Didactic, MST - Preceptor	49	8-200	0	\$1,320	* \$10.00
				Weighted Avg: 66			

* It will be made a condition of the contract that the trainees in Job Number 2 will never be paid less than the statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

Minimum Wage by County: Job Number 1 (HUA Job Creation): \$13.31 per hour in Los Angeles County and Job Number 2 (Job Creation HUA Reduced Wage): \$10.00 per hour for Los Angeles County.

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

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

Up to \$2.00 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 and 2 trainees.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Emergency Medical Technician		30
Paramedic		25
Registered Nurse		13
Dispatch/Call Takers		10
Billing		5
Support Staff		4

INTRODUCTION

Founded in 2000, PRN Ambulance, Inc. (PRN) (www.prnambulance.com) is a non-emergency inter-facility ambulance provider serving the greater Los Angeles area. PRN operates over 60 emergency response vehicles from its headquarters in North Hills, and two satellite facilities in East Los Angeles and Glendale. This is PRN's second ETP Agreement.

Though classified as a priority industry, PRN does not face out-of-state competition. As such, the project will be funded under Special Employment Training (SET) provisions for frontline workers.

PRN's clients are the patients of major healthcare providers, hospitals, and medical groups including Cedars-Sinai and Kaiser Permanente. The services include:

- Basic Life Support (BLS) transports for patients who do not require extra support or cardiac monitoring
- Advanced Life Support transports for patients who require a higher level of care during transport
- Critical Care transports for patients who may have immediate life-threatening illnesses or injuries associated with single or multiple organ failure
- Neonatal Intensive Care Unit (NICU) transports for high-risk and critically ill newborns.

The Patient Protection and Affordable Care Act of 2010 (Obama Care) significantly impacted PRN by increasing compliance costs, and reducing Medicare/Medi-Cal reimbursement for patient transport. PRN also has had to recognize different emergency care, as the medical community develops new protocols. As such, a wider range of geriatric care has been a growing focus. Also, there is a rising trend in high-acuity younger patients with complex medical conditions (cardiac conditions, diabetes, and stroke). In addition, emergency pediatric care is evolving; children need smaller equipment, and their care is subject to different protocols. These patient profiles require highly skilled employees to ensure safety and quality of care during transportation.

Retrainee - Job Creation

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

In this proposal, PRN has committed to hiring 87 new employees as shown in both Job Numbers 1 and 2. PRN represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of the contract.

Given the factors discussed above, such as an increasing number of patients with complex medical conditions, the demand for ambulance transport has been rising. PRN expects a continued growth in demand over the next few decades. In 2013, PRN opened a new 27,500 square foot facility in North Hills, and purchased two ambulances. PRN plans to purchase an additional five emergency vehicles in 2015.

PRN is planning to increase its full-time workforce over the next two years. To support this expansion, PRN partnered with another ambulance company for marketing and recruiting. PRN has also been conducting outreach programs with various emergency medical schools to help recruit qualified applicants. PRN streamlined new-employee orientation by creating a regularly-repeating schedule. The Company also designated more Field Training Officers, from experienced staff, to help new employees transition into a fast-paced, patient centered environment.

PROJECT DETAILS

PRN's new employees must be able to provide care during ground transport, and be prepared for a variety of contingencies that may arise. Training will be delivered by in-house subject

matter experts and/or specialized training vendors. The proposed training will commence in May 2015, and will take place at the Company's locations in North Hills and East Los Angeles.

Training Plan

Medical Skills Training

The Panel has established a "blended" reimbursement rate for Medical Skills Training, recognizing the higher cost of delivery for the Clinical Preceptor model. This blended rate, \$22 per hour, will apply to both the Didactic and Preceptor modes of delivery. For this project, 30 new Emergency Medical Technicians (EMT), 25 Paramedics, and 13 new Registered Nurses (RN) will participate in Didactic and Clinical Preceptor training classes. This training will target specific skills by occupation to ensure that trainees are competent in advanced medical transport procedures.

Medical Skills – Didactic (30%) – Training will be offered to EMTs, Paramedics, and RNs in order to learn the latest techniques and methodologies, and to incorporate best practices into their daily routines. Classes will cover general medical knowledge such as airborne and blood-borne pathogens, standards of care, controlled substance accountability/security, and provide expertise in specialty patient care situations.

Medical Skills – Clinical Preceptor (20%) – Training will be offered to EMTs, Paramedics, and RNs to reinforce proper ambulatory patient care in transit. Training will cover transport techniques, equipment operation, patient care and life support. Trainees will be placed with a preceptor for 3-5 days to practice what they learned in class. Clinical Preceptor hours will provide practical instruction, and allow trainers to document trainee skills to assure they meet established patient care requirements. Once trainees have met PRN standards, they are put into the field with a partner.

Continuous Improvement (50%) – Training will be provided to all occupations to foster improvement in skills such as ambulance and medical equipment operation; transport logistics and standardized protocols. Training will cover communication technology; transport physiology; customer service; standard operating procedures; leadership; and HIPPA. Documentation and Communication Skills will cover the use of Electronic Medical Records system to accurately enter and retrieve patient information, and report daily activities.

Impact/Outcome

The proposed ETP-funded training will help PRN subsidize the high cost of training of new and generally inexperienced staff, and provide good jobs despite facing a host of challenging regulations. As a result of the training, trainees will be able to provide competent and safe patient care with the quality outcomes demanded by the Affordable Care Act. This, in turn, will increase the commitment and retention of PRN employees, reduce turnover, and sustain growth.

Commitment to Training

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

PRN's training budget is \$75,000 per facility. This includes training in PRN Ambulance policies and procedures, restraint use, gurney operations/functions, customer service, professionalism, situational awareness, proper lifting technique, sexual harassment prevention training, ambulance equipment and supplies, and Emergency Vehicle Operations Course.

High Unemployment Area

All trainees in this proposal work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by 25%. The Company's locations in Los Angeles County qualify for HUA status under these standards. The Panel may modify the ETP Minimum Wage for these Job Creation trainees by up to 25%. PRN requests this modification, to \$10.00 an hour, for the 49 trainees in Job Number 2.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0186	Los Angeles	10/22/2012- 10/21/2014	\$249,240	\$120,145 (48%)

PRN provided 5,758 reimbursable training hours to 79 Job Creation trainees. This low performance was due to the following reasons:

- Inaccurate documentation of attendance on training rosters. As a result, a large number of part-time trainees, ineligible for ETP reimbursement were inadvertently enrolled. This error provided misleading information on PRN's performance during the Contract term. When the error was discovered, the retention period had started and the training hours could not be made up. Performance dropped from an anticipated 80-85% to 48% due to this error.
- The move of PRN's headquarters from East Los Angeles to North Hills was disruptive for the training and took longer than anticipated.

To avoid enrolling ineligible employees in the proposed contract, rosters will be carefully reviewed by an in-house administrator (Quality Assurance Coordinator). Accuracy of attendance rosters will also be checked in-house by staff in Human Resources. PRN and the Administrative Subcontractor will work together in inspecting and correcting the employee classifications when necessary.

DEVELOPMENT SERVICES

PRN retained National Training Systems, Inc. (NTS) in Ladera Ranch to assist with development of this proposal for a flat fee of \$9,600.

ADMINISTRATIVE SERVICES

NTS will also perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

To Be Determined

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

8-200 Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

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

MEDICAL SKILLS TRAINING-DIDACTIC

- Airborne Pathogens
- Bariatric Patient Care
- Basic Life Support (BLS)
- Blood-borne Pathogens
- Body Mechanics
- Cardiac Assessment
- Cardiac Patient Care
- Care and Treatment of Shock Patients
- Chronic Obstructive Pulmonary Disease (COPD)
- Code Blue Response and Procedures
- Critical Care Skills
- Decontamination Procedures
- Dysrhythmia Recognition & Interpretation
- EKG & Cardiac Monitors
- Emergency Medical Technician (EMT) Skills/EMT-1
- Equipment Operation
- Geriatric Patient Care
- Hazardous Materials/Protection
- HIPPA
- Medical Transport of High-Risk Patients
- Medication Administration & Reconciliation
- Neonatal Intensive Care Unit (NICU) Transport
- Neurological Assessment& Pre-Hospital Care
- Orthopedic Assessment& Pre-Hospital Care
- Orthopedic Stabilization & Traction
- Oxygen Administration

- Pain Management
- Patient Assessment & Pre-Hospital Care (this is the topic the state will fund for annual skills updates)
- Pediatric Patient Care
- Pharmacology & Pharmacokinetics
- Pre-Hospital Trauma Life Support
- Psychiatric Patient Care
- Renal Patient Care
- Respiratory Arrest
- Respiratory Assessment & Pre-Hospital Care
- Restraints
- Standards of Care
- Stroke Patient Care
- Ventilator Operation

MEDICAL SKILLS TRAINING-CLINICAL W/PRECEPTOR

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

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



RETRAINEE - JOB CREATION

Training Proposal for:

C&D Zodiac, Inc.

Agreement Number: ET15-0424

Panel Meeting of: April 24, 2015

ETP Regional Office: San Diego

Analyst: J. Davey

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Aerospace and Defense Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Los Angeles, Orange, 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: 3,600	U.S.: 5,700	Worldwide: 12,800	
<u>Turnover Rate:</u>	7%			
<u>Managers/Supervisors:</u> (% of total trainees)	5%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$424,740		\$118,680 30%	\$0		\$306,060

In-Kind Contribution:	100% of Total ETP Funding Required	\$442,438
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg Skills	430	8-200	0	*\$642	\$15.07
				Weighted Avg: 51			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg Skills	30	8-200	0	\$1,000	**\$12.33
				Weighted Avg: 50			

*Reflects Substantial Contribution

**It will be a condition of contract that trainees in this Job Number will never be paid less than the statewide minimum wage in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

Minimum Wage by County: Job Number 1: \$16.02 in Orange County; \$15.97 in Los Angeles County; and \$15.07 in San Bernardino County. Job Number 2 (Job Creation): \$13.35 in Orange County; \$13.31 in Los Angeles County; and \$12.33 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 \$3.60 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 2.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		30
Engineers		95
Lead		35
Manager/Supervisor		20
Production Worker		190
Technical Support Staff		60
Job Number 2		
Administrative Staff		5
Engineers		5
Lead		3
Manager/Supervisor		2
Production Worker		10
Technical Support Staff		5

INTRODUCTION

C&D Zodiac, Inc. (C&D Zodiac) designs and manufactures aircraft interior components, such as seats, overhead bins, cabinets, galleys, lighting, stairways and doors. Established in 1972 as an aircraft holding-tank company, C&D Zodiac evolved into a major manufacturer for commercial and private aircraft companies such as Boeing, Airbus, and Bombardier. C&D Zodiac's U.S. corporate headquarters are located in Huntington Beach.

C&D Zodiac reports that demand for its products continues to grow. Airlines compete for First and Business Class travelers. Airline companies strive to create repeat customers who are attracted to their product and services. As a result, airlines try to improve the quality of the traveling experience often. Since airlines derive most of their revenue from First and Business Class travelers, the industry is making a major shift in cabin configurations. First and Business Class is being converted to Business First Class. These sections are refurbished every five years and C&D Zodiac is an integral part to this process. These changes have created new design and manufacturing opportunities for the Company.

C&D Zodiac manufactures its own high quality, lightweight composite materials, which give them an edge over competitors. From these base materials, the Company produces the composite constructions (fiberglass, Kevlar and graphite) that are combined with various plastic resins to meet the Federal Aviation Administration's (FAA) interior cabin flammability requirements. Each aircraft manufacturer or airline has unique aesthetic requirements in addition to FAA and safety requirements. Due to the complex nature of the manufacturing process and business competitiveness, the Company employees need to learn new manufacturing techniques and ways to reduce costs, improve product quality and improve on-time delivery.

To remain competitive, C&D Zodiac employees need training on new manufacturing techniques, ways to reduce costs, improve product quality and on-time delivery.

PROJECT DETAILS

This is C&D Zodiac's third ETP project. Although most of the types of training under the new proposal were also included in its active and prior projects, many of the skills were either not delivered or will be delivered to a new trainee population. In addition, many of the Manufacturing Skills in the new proposal are for employees in continually changing composite plastic and injection molding manufacturing techniques, required by airlines who have purchased new aircraft and are refurbishing existing ones. Cross-functional skills will also be delivered as new trainees are hired. In addition, newly hired Job Number 2 trainees will receive new skills training that were delivered in the previous project.

Retrainee - Job Creation

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

C&D Zodiac has committed to hiring 30 new employees (Job Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract. Substantial Contribution requirement is waived for Job Creation (Job Number 2).

Although the Company does not plan to upgrade or improve the existing facilities or equipment during the term of this contract, it is reconfiguring existing facilities to meet the requirements of the new product lines. The 30 new employees will be hired to meet the demand for Business First and First Class cabin changes from Zodiac's customers to support the expansion of current job functions.

Training Plan

Training will take place at C&D Zodiac's facilities in Los Angeles County (La Palma), Orange County (Huntington Beach, Garden Grove, Cypress); and San Bernardino County (Ontario (two locations) and Rancho Cucamonga).

Business Skills (10%): Training will be offered to Administrative Staff, Leads and Managers/Supervisors in Communication Skills, Customer Service & Sales Skills, Goal Setting, Performance Management, Project Management and Product & Service Knowledge. Training will help workers to resolve customer problems quickly. With product knowledge, trainees will be able to identify problems and accurately meet customer needs. This will result in improved customer satisfaction and improved delivery times.

Computer Skills (20%): Training will be offered to Leads and Managers/Supervisors in 3D PDF Viewer software, Advanced CAD, Computerized Reports, Engineering Software, Hardware & Software Systems Tools, MS Office (intermediate and advanced), Royal 4-to-M3 MRP Conversion and other related applications. The Company is upgrading to the M3 MRP system. This will allow the Company to design and manufacture new customized products and services. As business expands, Zodiac will be able to design and manufacture products more efficiently.

Manufacturing Skills (50%): Training will be offered to Production Workers in Assembly Procedures & Methods, Component Manufacturing, Cross-Functional Skills, Inspection Procedures, Lot Traceability, Manufacturing Operating Procedures, Plastic Thermoforming, Injection Molding and other related skills. New manufacturing procedures are being implemented to improve production processes, reduce waste and improve product quality. Training will help the Company improve its Production Staff's technical knowledge.

Continuous Improvement (10%): Training will be offered to all occupations including Auditor Procedures, Boeing & Airbus Inspection Procedures, Best Manufacturing Processes, Lean Manufacturing and Team Building. The Company has determined that continuous improvement is critical to its success. C&D Zodiac will create teams to identify ways to improve product quality and identify waste in the production process. As training progresses, it is expected that Lean Manufacturing and its related components will lead to further ways to reduce costs, improve efficiency, and increase productivity.

Hazardous Materials (5%): Training will be offered in Hazardous Materials & Waste, HAZMAT Requirements, Emergency Response Team Training, and HAZMAT Skills. Workers use chemicals to formulate materials that create the products. Workers need to learn how to combine chemicals correctly and what to do when there is a hazardous chemical spill.

1. Hazardous Materials (HAZMAT). This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, 75 Leads, Managers/Supervisors, Production Workers and Technical Support Staff will receive approximately 10 hours of training per trainee. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and

CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, certification is by To Be Determined.

PL-Manufacturing Skills (5%): Training will be offered to Production Workers in hand-on instruction in Assembly Procedures & Methods, Component Manufacturing, Cross-Functional Skills, Inspection Procedures, Lot Traceability, Manufacturing Operating Procedures, Plastic Thermoforming, Injection Molding and other related skills. New manufacturing procedures are being implemented that will improve production processes, reduce waste, and improve product quality.

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

C&D Zodiac states that classroom instruction is not an adequate means of training delivery because trainees must learn how to operate proprietary equipment that requires hands-on experience. The equipment is too large to bring into a classroom. Trainees who are proficient on one type of equipment will be cross-trained on new equipment. New hires will also be trained on this equipment. Trainers will commit 100% of their time to the trainees during PL training sessions.

During PL training sessions, workers will be trained on equipment operating procedures. The instructor will certify that the trainee is competent to operate the equipment on his own. Only Production Workers will receive up to 30 hours of PL training.

PL Trainer-to-Trainee Waiver Request

C&D Zodiac is requesting a waiver to the standard 1:1 trainer-to-trainee ratio for Productive Lab training. Due to the complexity and high cost of equipment, materials and trainers time, C&D Zodiac is requesting a 1:3 ratio. The Company does not have enough trainers to deliver training one-on-one. Delivering training at a lesser ratio would be cost prohibitive.

Temporary to Permanent Hiring

Ten trainees in Job Number 2 (Job Creation) come under Panel guidelines for "temporary to permanent" employment. C&D Zodiac will retain these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. (Unemployment Insurance Code Section 10201(c).) However, the retention and post-retention wage requirements cannot be satisfied until after C&D Zodiac has hired them. Until then, the Company will not receive progress payments.

Commitment to Training

C&D Zodiac spends a total of \$310,000 per year for training its California workers. Currently the Company provides OSHA-mandated safety regulation training, sexual harassment prevention, new hire orientation, basic computer skills training, basic commercial skills, and manufacturing skills. Safety training is provided in accordance with all pertinent requirements under state and federal law. C&D Zodiac represents that ETP funds will not displace the existing financial commitment to training.

➤ Training Infrastructure

The Company has a dedicated in-house training staff and administrators at each location. The Company has also hired an administrative subcontractor. Since this is their fourth ETP Agreement, C&D Zodiac has experience administering ETP training projects.

Substantial Contribution

C&D Zodiac is a repeat contractor with payment earned in excess of \$250,000 at the seven facilities within the past five years. (See Prior Project Table.) Accordingly, reimbursement for trainees at the seven facilities in Job Number 1 will be reduced by 30% to reflect the Company's \$118,680 Substantial Contribution to the cost of training.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by C&D Zodiac under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Expected to Complete Training	No. Expected to be Retained
ET13-0236	\$447,750	1/1/13 – 12/31/14	420	481	481

ETP's online tracking system shows 26,435 eligible training hours for \$447,750 (100%) in eligible earnings if all requirements are met. C&D Zodiac submitted the final (closeout) invoice on 2/16/15: 481 retentions (434 Job 1 trainees and 47 Job 2, Job Creation trainees). The final closeout invoice is currently being processed by ETP.

PRIOR PROJECTS

The following table summarizes performance by C&D Zodiac under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET11-0199	Huntington Beach	4/11/11 – 4/10/13	\$255,150	\$86,776 (34%)
ET10-0230	Huntington Beach	9/28/09 – 9/27/11	\$246,960	\$246,960 (100%)

ET11-0199 – C&D Zodiac's second ETP project was Job Creation training for newly hired retrainees. Zodiac hired and trained more than 400 new employees. Despite providing more than 15,000 hours of training, very few of these trainees received the minimum 24 hours for full reimbursement because there were internal difficulties having trainees and trainers complete and sign class/lab rosters correctly. These difficulties were caused by confusion with some of the Company's own internal forms that differ from ETP rosters.

ET10-0230 – C&D Zodiac successfully trained and placed 250 trainees. This was the first time the Company had conducted significant training in a planned, organized way to a large employee population.

DEVELOPMENT SERVICES

National Training Company in Irvine assisted with development of this proposal for no charge.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Auditor Procedures
- Boeing and Airbus Inspection Procedures
- Best Manufacturing Practices
- C&D Quality Systems
- Root Cause Analysis
- 5S (Sort, Set in Order, Shine, Standardize, Sustain)
- Standard Work Instructions
- Team Building
- Team Problem Solving

COMPUTER SKILLS

- 3D PDF Viewer
- Advanced Computer-Aided Design
- Computerized Reports
- Engineering Software Applications
- Hardware and Software Systems Tools
- Manufacturing Resource Planning Software
- MS Office (Intermediate and Advanced)
- Royal 4 to M3 Software Conversion
- Web-Based Computer Applications

MANUFACTURING SKILLS

- Assembly Procedures and Methods
- Component Fabrication
- Creating Workflows
- Cross-Functional Skills
- Design Standards and Processes
- Engineering & Design Procedures
- Forklift Procedures
- Inspection Procedures
- Lean Manufacturing
- Lot Traceability
- Manufacturing Operating Procedures
- Plastic Thermoforming
- Plastic Injection Molding
- Reading Technical Specifications
- Resolving Production Problems
- Standard Operating Procedures

BUSINESS SKILLS

- Communication Skills
- Customer Service and Sales Skills
- Goal Setting
- Performance Management Skills
- Project Management
- Product and Service Knowledge

HAZARDOUS MATERIALS

- Hazardous Materials
- Hazardous Waste
- Emergency Response Team Training
- HAZMAT Training

PL Hours

0 – 30

MANUFACTURING SKILLS (Ratio 1:3)

- Component Fabrication Equipment
- Component Forming Equipment
- Plastic Thermoforming Equipment
- Plastic Injection Molding Equipment
- Production Assembly and Repair Equipment

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 30 hours per-trainee.



Training Proposal for:
Ricoh Americas Corporation
Agreement Number: ET15-0420

Panel Meeting of: April 24, 2015

ETP Regional Office: San Diego

Analyst: M. Ray

PROJECT PROFILE

Contract Attributes:	Retrainee SET HUA	Industry Sector(s):	Services Warehousing Technology/Other Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Orange, Santa Clara, San Diego, San Francisco, Los Angeles, Contra Costa, Sacramento, San Mateo, San Bernardino, Sonoma, San Joaquin, Alameda, Fresno	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: 2,700	U.S.: 36,000	Worldwide: 81,000
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	3%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$137,850		\$0	\$0		\$137,850

In-Kind Contribution:	100% of Total ETP Funding Required	\$242,054
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	30	8-200	0-100	\$600	\$16.02
				Weighted Avg: 40			
2	Retrainee SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	80	8-200	0-100	\$750	\$27.40
				Weighted Avg: 50			
3	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	70	8-200	0-100	\$855	\$14.00
				Weighted Avg: 57			

Minimum Wage by County: Job Number 1 Retrainees: \$16.02 per hour in Orange County; Job Number 2 SET Retrainees: Statewide Average Hourly Wage of \$27.40; and Job Number 3 HUA Retrainees: \$11.30 per hour in Fresno (City of Fresno) and San Joaquin (City of Stockton) Counties; and \$11.98 per hour in Los Angeles (City of 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

Health benefits of up to \$2.02 per hour for Job Number 1 and up to \$2.27 per hour for Job Number 2 may be added to trainee's wages to meet the Post-Retention Wage. Commissions will also be used to meet the required SET hourly wage for Sales Staff in Job Number 2. The commission amount ranges from \$1.24 per hour to \$19.76 per hour. The average commission amount is approximately \$6.74 per hour as explained on page 6 of 7.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1:		
Distribution		5
Regional Operations Support		10
Information Technology		10
Manager		5
JOB NUMBER 2:		
Sales I		6
Sales II		9
Technician		20
Customer Support		15
Information Technology		15
Operations Support		15

JOB NUMBER 3:		
Sales		20
Technician		20
Information Technology		10
Operations Support		20

INTRODUCTION

This will be the fourth ETP Agreement for Ricoh Americas Corporation (Ricoh). Founded in 1962, Ricoh (www.ricoh-usa.com) distributes, imports, markets, sells, and services digital office equipment including copiers, printers, facsimile systems, scanners, digital duplicators, wide format copiers, digital cameras, projectors, and network accessories. The Company also offers managed document and information technology services. Ricoh serves large to medium size companies requiring high volume, high speed, and multiple finishing capabilities as well as small-sized businesses and individuals requiring multi-function production.

Headquartered in Pennsylvania, Ricoh also maintains locations throughout North America, Latin America, Europe, Middle East, Africa, Asia/Pacific, and Japan. The proposed training plan will target approximately 180 workers in 42 California facilities: 2 locations in Tustin and one each in San Jose, Irvine, San Diego, San Francisco, Los Angeles, Concord, Cerritos, Woodland Hills, Sacramento, Brisbane, Campbell, Ontario, Petaluma, Stockton, Rancho Cordova, Hayward, Glendale, Fresno, South San Francisco, Walnut Creek, Oakland, Mountain View, Culver City, and San Francisco.

In its project ending in 2011 (ET09-0476), the training plan included training for its California workers to focus on a paradigm shift in the Company's business model and implementation of its Enterprise Resource Planning system. Training enabled trainees to support new initiatives and technological advancements to increase the Company's competitive edge and differentiate itself from its competitors.

In its most recent ETP Agreement (ET12-0418), the training plan included training for its California workers to focus on implementation of new products and services as well as process improvement initiatives as a result of the Company's integration with IKON. During this contract term, Ricoh provided trainees with various class/lab and Computer-Based Training (CBT) training to address the change in customer base and rapid technological change in the service industry.

The proposed training plan may include employees who have participated in previous contracts and some curriculum topics are repeated; however, Ricoh confirmed that the subject matter has been updated, so there will be no duplication of training in those courses. In addition, the trainee population has been expanded to include recently hired employees who have not received ETP-funded training in the past.

PROJECT DETAILS

Ricoh must continue doing business as a solid total solutions provider in order to remain competitive. The Company's most recent acquisition of MindSHIFT, a cloud computing and support organization, will help the Company remain a solid provider. The acquisition expands its services in workflow consulting, security access, content management development, and network business applications. This new service expansion will require Ricoh to ensure its

Information Technology and Sales/Service Staff are up-to-date on the most current technology and products.

In addition to this service expansion, Ricoh is also committed to company growth. Thus, it has developed business methodologies to address continuous process improvement specifically focused on customer performance:

- **Sales Development: 5-Floor Leadership Sales Plan** – Ricoh is launching a leadership sales plan that builds upon the 7-Step Sales Process implemented in the previous ETP Agreement. The 7-Step Sales Process is designed to improve skills, identify processes, develop tools, and improve overall sales effort. The implementation of the 5-Floor Leadership Sales Plan will integrate all aspects of sales organization including order processing, the Customer Relationship Management (CRM) system, and corporate initiatives to increase sales forecasting accuracy and prioritize sales opportunities.
- **Managed Services Team** – Ricoh is developing a Managed Services Certification Program to focus on requisite equipment and process support specific to customers, existing products, and potential product needs. This initiative will require training certification for trainees. Training will increase efficiencies and ensure optimized on-site customer service.

Training Plan

Business Skills (20%) – Training will be offered to all job occupations. Course topics such as 5-Floor Leadership Sales Plan, Customer Value Proposition, and Services-Led Customer Service Approach will provide trainees with improved and consistent customer service to successfully perform their job functions within the organization.

Commercial Skills (40%) – Training will be offered to Technicians and Sales Staff. Training in Cloud Services Development, New/Upgraded Technologies, Networking/Security Concepts, and Technology Solutions Installation/Maintenance will enable frontline workers to better perform their specific job responsibilities selling, installing, maintaining, and serving Ricoh's products and systems.

Computer Skills (20%) – Training will be offered to all job occupations. Trainees will receive advanced Microsoft Office, CRM system, EDGE Dispatch system, and Managed Services Certification skills. Training will allow them to competently navigate Ricoh's systems.

Continuous Improvement (20%) – Training will be offered to all job occupations. In a continued effort to provide high quality service to its customers, Ricoh plans to provide its workers with skills that will increase their performance in the areas of leadership development, planning/efficiency skills, problem solving/decision making skills, and process & quality improvement techniques.

Computer-Based Training

To support Class/Lab training, Ricoh will also provide CBT in Business, Computer, and Continuous Improvement Skills. CBT will allow trainees to train at their own pace and will be provided prior to or subsequent to a Classroom/Instructor-Led training to ensure greatest learning/skills transfer. Some Technicians and Sales Staff may receive up to 100 hours of CBT while the remaining occupations will not receive more than 40 hours per trainee. CBT will not exceed 50% of total training hours per trainee.

Commitment to Training

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

In 2015, Ricoh's annual training budget for its California facilities is approximately \$1,300,000. The Company provides ongoing basic job skills, new employee orientation, diversity, performance management skills, anti-harassment, extensive on-the-job, ride-along, introductory computer skills, interviewing skills, and selecting and assessing talent skills trainings. ETP funds will allow Ricoh to implement new curriculum related to the new technologies described in this proposal.

➤ Training Infrastructure

Ricoh has identified two individuals to manage the ETP project. The Project Manager will oversee the overall project. An additional individual located in California will be responsible for scheduling, delivering, documenting, and managing training for all California facilities. This person will also meet with ETP staff and work with Ricoh's third-party administrator.

Special Employment Training (Job Numbers 2 & 3)

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be frontline workers earning at least the statewide average hourly wage of \$27.40 at the end of the retention period. (Unemployment Insurance Code 10214.5. Title 22, CCR, Section 4409(a).)

SET/HUA Wage Modification (Job Number 3)

The 70 trainees in Job Number 3 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by 25%. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. Normally, the Panel may modify wages for HUA workers by up to 25% of the ETP Standard minimum wage. For this project, Ricoh is requesting a wage modification of 13% for Los Angeles and 7% for Fresno and Stockton in order to serve workers in lower-wage occupations at these locations.

Commissions

The Panel may use commission earnings to determine a trainee's hourly wage, if there is a reliable history of commission payment by the employer and if actual payment can be verified. Ricoh will use commissions to meet the Post-Retention wage of \$27.40 for the Sales Staff in Job Number 2. The base hourly rate for Sales Staff ranges from \$18.39 - \$52.50 per hour. The average monthly commission for the Sales Staff in Job 2 for the last 12 consecutive months was at least \$6.74 per hour. As such, all Sales Staff will qualify for training with the use of commissions (and health benefits if needed).

Electronic Recordkeeping

Ricoh currently uses a Learning Management System (LMS) to schedule training and track training attendance. The Company has requested to utilize its LMS to document training in this proposal. This system has been reviewed and approved by ETP staff.

Substantial Contribution

A substantial contribution does not apply to this proposal because the Applicant has not earned \$250,000 or more within five years in prior agreements at the same facility.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET12-0418	Statewide	6/30/2012- 6/29/2014	\$189,810	\$138,592 (73%)
**ET09-0476	Statewide	3/9/2009- 3/8/2011	\$495,510	\$139,042 (28%)

****ET09-0476:** The ETP Agreement experienced issues with trainees that did not meet the ETP SET wage and/or did not make enough commission to help them to meet the ETP SET wage. As a result, Ricoh performed a wage analysis and targeted employees who made ETP minimum wage requirements to avoid performance issues due to wage. Ricoh provided training to those trainees who did not meet ETP's wage requirement at its own expense. Additionally, Ricoh included new functions that were not included previously and the new employees acquired from IKON were not included in the previous agreement.

DEVELOPMENT SERVICES

Ricoh retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of \$11,000.

ADMINISTRATIVE SERVICES

Ricoh also retained TFP to perform administrative services in connection with this proposal for a fee not to exceed 12% of payment earned.

TRAINING VENDORS

To Be Determined

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

8–200 Trainees may receive any of the following:

BUSINESS SKILLS

- 5 Floor Leadership Sales Plan
- Business Process Skills
- Customer Value Proposition
- Finance/Accounting Skills
- New/Upgraded Products
- Services-Led Customer Service Approach
- Supply Chain Management

COMMERCIAL SKILLS

- Cloud Services Development
- New/Upgraded Technologies
- Networking/Security
- Technology Solutions Installation/Maintenance
- Total Green Office Solutions Products

COMPUTER SKILLS

- Advanced Microsoft Office Skills
- Customer Relationship Management (CRM) System
- EDGE Dispatching System
- Managed Services Certification

CONTINUOUS IMPROVEMENT

- Leadership Development
- Planning/Efficiency Skills
- Problem Solving/Decision Making Skills
- Process & Quality Improvement Techniques
- Project/Program Management

CBT Hours

0 – 100

BUSINESS SKILLS

- Advanced Sales Skills
 - Equitrac Office & Express Certification for Ricoh Design Consultants (1 hour)
 - Equitrac Office & Express Sales Training and Certification (1.5 hours)
 - Equitrac Product Manager Presentation for Ricoh Design Consultants (1 hour)
 - Nuance eCopy ShareScan Certification for Ricoh Design Consultants (1 hour)

- Nuance eCopy ShareScan Product Manager Presentation for Ricoh Design Consultants (1 hour)
- Nuance eCopy PDF Pro Sales Training & Certification (0.5 hour)
- Nuance eCopy Medical 360 Sales Training & Certification (0.67 hour)
- Pharmaceutical Industry Module 1: Trends and Challenges (1.25 hours)
- Pharmaceutical Module 2: Trends, Challenges & Regulatory Affairs (0.75 hour)
- Pharmaceutical Module 4: HR and Changing Workplace Key Value Areas (1 hour)
- New/Upgraded Products
 - MP C2003 (D176) Series Self-Paced Update (2.67 hours)
 - MPC3003 (D146) Series Service Tier 1 Training (6 hours)
 - MP C6502SP/MP C8002SP/PRO C5100S/PRO C5110S (D135/D136/D137/D138) COLOR MFP Tier 1 Self-Paced V2 (8 hours)
 - D129 Series Self Pace Update (3 hours)
 - Introduction to iProcurement (0.5 hour)
 - Convert to Print Intake Training (0.67 hour)
 - Parts Documentation Overview (1 hour)
 - Fiery Systems Blended Learning Part 1 - Section 1 (1 hour)
 - Pro 8100 (D179) Series Service Tier 1 (6 hours)
 - Pro C7100 (D194) Selfpace Update Course (4.5 hours)
 - CAC/PIV v3 MFP Blended Learning Part 1 (3 hours)
 - MP C401 D191 Family Self Pace (6 hours)
 - Fiery Systems Blended Learning Part 1 - Section 3 (8 hours)
 - Fiery Systems Blended Learning Part 1 - Section 4 (1 hour)
 - EDGE - MOD 3: Basic Call (0.5 hour)
 - The Perfect Service Call (4 hours)
 - EDGE - MOD 10: Retag (0.5 hour)
 - EDGE - MOD 11: Meter Skip (0.75 hour)
 - EDGE - MOD 12: After Hours (0.5 hour)
 - EDGE - MOD 13: Standalone (0.75 hour)
 - EDGE - MOD 9: Give Estimate (0.5 hour)
 - Color Theory and Process for HP Printers (4 hours)
 - D104 (MP C2051) Series Self-Paced Update (16 hours)
 - Image Formation for HP Printers (1.5 hours)
 - Introduction to Business Scanning (2 hours)
 - EDGE - MOD 14: Field Opens (0.5 hour)
 - EDGE - MOD 15: First Time Call New Install (0.5 hour)
 - EDGE - MOD 24: Receive Inventory (0.5 hour)
 - M080 Self-Paced Service Training (16 hours)
 - Pro L4130/4160 (M152/M153) Color Wide Format Part 1 (4.83 hours)
 - Pro C900 (G178) Series Blended Learning Part 1 (8 hours)
 - Pro C900 (G178) Series Blended Learning Part 1 (1.37 hours)
 - Field Service Manager SmartManage Training - Module 1 Introduction to ETAdirect (1.5 hours)
 - Field Service Manager SmartManage Training - Module 2 Rversion (1.5 hours)
 - Field Service Manager SmartManage Training - Module 3 Technician Management (1.5 hours)
 - Field Service Manager SmartManage Training - Module 4 Reports (1.5 hours)

- Field Service Manager SmartManage Training - Module 5 Next Steps (1.5 hours)
- MP 6002 (D131)Series Tier 1 (6 hours)
- SP 311SFNw (M157) Self Pace Service Training (2 hours)
- WBDI v2 (3 hours)
- Service-Led Customer Service Approach
 - Defining the New Ricoh - Imperative for Change (0.67 hour)
 - Working as a Team (0.5 hour)
 - Attitude for Success (0.5 hour)
 - Working Together: Ricoh and the Supply Chain Process Flow (1 hour)
- Art of Communication (0.95 hour)
- Powerful Communication Skills (1.6 hours)
- Ricoh Organizational Change Management "The Basics" (0.75 hour)
- Assertiveness (1.07 hours)
- Better Business Writing (0.75 hour)
- Effective Presentation Skills (0.57 hour)
- Business Communication Fundamentals (0.57 hour)

COMPUTER SKILLS

- Amazon Locker Self-Paced Training (2 hours)
- Meeting Room Services for Operations (1 hour)
- Smart Operation Panel (D148-81) Self-Paced Training (1.5 hours)
- 05: Procedures and Professional IT Communication (1.48 hours)
- Compensation Workbench Training for Managers - STI 2014 Semi-Annual Processing (0.75 hour)
- 1: Installing and Configuring Windows Server 2012 (2.6 hours)

CONTINUOUS IMPROVEMENT

- Developing an Effective Individual Development Plan Online Course (0.5 hour)
- Defining the New Ricoh – The Role of the Manager (0.67 hour)
- Leadership Competencies at Ricoh (0.75 hour)
- Ricoh's Performance Management Process Online Training (0.5 hour)
- Coaching with Confidence (6.5 hours)
- Effective Delegation (3.9 hours)

<p>Note: Reimbursement for retraining is capped at 200 total hours per trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per trainee.</p>
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RETRAINEE - JOB CREATION

Training Proposal for:

Caber Enterprises, Inc. dba Mission Care Group

Agreement Number: ET15-0418

Panel Meeting of: April 24, 2015

ETP Regional Office: Sacramento

Analyst: W. Sabah

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Medical Skills Training Retrainee Priority Rate SET HUA	Industry Sector(s):	Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kings, Tulare	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: 300	U.S.: 300	Worldwide: 300
<u>Turnover Rate:</u>	17%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$424,614		\$0	\$0		\$424,614

In-Kind Contribution:	100% of Total ETP Funding Required	\$675,840
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET HUA Medical Skills Training	MS Didactic, MS Clinical with Preceptor, Business Skills, Computer Skills, Cont. Imprv.	189	8-200	0	\$1,566	\$11.30
				Weighted Avg: 87			
2	Retrainee SET HUA Job Creation Initiative Medical Skills Training	MS Didactic, MS Clinical with Preceptor, Business Skills, Computer Skills, Cont. Imprv.	48	8-200	0	\$2,680	\$9.80*
				Weighted Avg: 134			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

Minimum Wage by County: Job Number 1: Trainees must earn at least \$11.30 in Kings and Tulare counties; Job Number 2 : \$9.80 for trainees in Kings and Tulare 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 \$1.25 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job 1		
Certified Nurse Assistant (CNA)		115
Licensed Vocational Nurse (LVN)		50
Registered Nurse (RN)		8
Administrative Staff		8
Frontline Manager		8
Job 2		
Certified Nurse Assistant (CNA)		12
Licensed Vocational Nurse (LVN)		20
Registered Nurse (RN)		10
Administrative Staff		6

INTRODUCTION

Founded in 1991, Caber Enterprises, Inc. dba Mission Care Group (Caber Enterprises) (www.missioncgroup.com) owns and operates four rehabilitation and skilled nursing care facilities in Visalia, Tulare and Hanford. The Company now employs 300 professionals, providing 24-hour recovery services and nursing care to patients following an illness, injury or surgery. All four facilities will participate in training under this proposal.

Caber Enterprises is eligible for ETP funding under Special Employment Training (SET) provisions for frontline workers. Caber Enterprises also qualifies for ETP's priority industry reimbursement as a healthcare provider.

PROJECT DETAILS

Caber Enterprises is undergoing a paradigm shift where new reimbursement models, an aging population and changes mandated under the Affordable Care Act have placed tremendous pressure and requirements on skilled nursing facilities. The Company must deliver better outcomes, lower costs and provide more appropriate access to care by changing the way they screen, admit, care for, bill and discharge patients.

Consumers have become more responsible for paying for their own healthcare, which has increased the influence of healthcare service costs and values to patients. Caber Enterprises will require training in cost-effective programs and nursing skills to improve customer satisfaction and to identify solutions to issues that are currently arising. This will allow patients the ability to interact with their healthcare providers and access their healthcare information in an efficient way.

Caber Enterprises will focus on their day-to-day operations to develop new strategies, increase short-term cost-saving opportunities, and improve performance to ensure that their cost structure and operation infrastructures are aligned with their long-term goals to improve patient services. Caber Enterprises will be developing adaptive and interactive technology platforms to detect care gaps, manage costs, and measure consumer needs and expectations to better manage chronic illnesses and end of life care.

There has been a global shortage in skilled nurse workers as many nurses do not have higher level clinical education/critical thinking skills required to take care of patients when they are out of school. As patients with injuries and illnesses are being discharged from hospitals sooner, nurses and employees at Caber Enterprises will require training to identify deficiencies in care and subsequently improve nursing care to increase customer satisfaction.

The proposed training will help Caber Enterprises improve processes, increase quality of services, meet new demands for high quality care, implement technological enhancements, and expand full-time staff. In addition, enhancing employee skills will enable Caber Enterprises to remain competitive, expand into new markets and offer workplace promotional opportunities.

Training Plan

Caber Enterprises will provide Class/Lab, Medical Skill-Didactic, and Medical Skill-Preceptor training to staff. Training will be delivered by a combination of both in-house trainers and training vendors. The Company plans on starting training on May 1, 2015.

Medical Skills Training

For this project, approximately 26 Registered Nurses (RNs), 70 Licensed Vocational Nurses (LVNs), and 127 Certified Nurse Assistants (CNAs) will participate in clinical skills training utilizing both Didactic and Clinical with Preceptor training methodologies.

The Panel has established a “blended” reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. Medical Skills training is reimbursed at a blended rate of \$22 per hour.

Business Skills (5%): Training will be offered to all occupations to improve documentation skills, to foster quality and continuity of care, and increase efficiency and improve customer service. Training will include course topics such as Communication, Conflict Management, Time Management, American Medical Association Procedures and External Evacuation Procedures.

Computer Skills (10%): Training will be offered to all trainees in the use of various medical software solutions. As part of the new Electronic Medical Records System (EMR), training will focus on documenting patient information, managing health records, and measuring consumer needs. Intermediate and Advanced Microsoft Office training will be delivered to select trainees. Training will include EMR, Microsoft Office (Intermediate/Advanced), and Point Click Care Electronic Health Record.

Continuous Improvement (5%): Training will be offered to all occupations to enhance customer service, improve the patient experience, and increase teambuilding initiatives. Leadership training will be offered to Frontline Managers to enhance company culture and employee loyalty. Training will include course topics such as Leadership/Employee Management, Patient and Family Satisfaction, Team Building, Admissions, and Supervision of Patient Care.

Retrainee - Job Creation

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

Caber Enterprises has been growing at the rate of 11% annually and anticipates that the Company will achieve a growth rate of 30% within the next two years. Due to an aging population which raises patient acuity and new requirements under the Affordable Care Act, Companies are experiencing changes in its operations and services. In the past, patients would remain in the hospital following surgery or other acute care. Today, patients are turning to skilled nursing facilities for multi-faceted post-acute care, which has increased patient volume. To meet the demands of increased customers, the Company has implemented a ‘Rapid Recovery Program’ at all four facilities to provide rehabilitation services 24 hours per day 7 days per week. The ‘Rapid Recovery Program’ will be implemented in an effort to send patients back to their families and normal lives in a more expedient and cost-effective manner. To support the program, the Company will add one additional shift per facility. In addition, Caber Enterprises will expand its cardio pulmonary care program to facilitate the Rapid Recovery Program. The Company will be expanding their existing business capacity by adding newly-hired RN's, LVN's, CNA's, and Administrative Staff to their existing function.

In this proposal, Caber Enterprises has committed to hiring 48 new employees as shown in Job Number 2. Caber Enterprises represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a

condition of contract.

SET/HUA

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

Wage Modification

Trainee in Job Number 1 and 2 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 15%. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. The Company's locations in Kings and Tulare are in a 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. Caber Enterprises is requesting a wage modification to \$11.30 for Job Number 1 and \$9.80 for Job Number 2 in order to serve workers in lower-wage occupations.

Commitment to Training

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

The Company's annual training budget per facility is approximately \$100,000 for new hire orientations, company policies, on the job training, staff development, and safety training.

ETP funds will allow the Company to expand its class/lab and clinical training efforts, cross-train, and offer additional skills enhancements training to current and newly-hired nursing staff to support the Company's growth plans.

➤ Training Infrastructure

Caber Enterprises will contract with an administrative subcontractor to assist with ETP project administration. In addition, each facility will have a designated staff person to oversee the training and be responsible for scheduling, collecting, and submitting the training rosters to the administrative subcontractor for data entry into the ETP systems.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Caber Enterprises retained Synergy Management Consultants, LLC in Grass Valley to assist with development of this proposal for a flat fee of \$33,969.

ADMINISTRATIVE SERVICES

Caber Enterprises also retained Synergy Management Consultants to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Respiratory Care Plus of Fresno and Model Drug of Kingsburg has been retained to provide any of the following types of training: Business Skills, Computer Skills, Continuous Improvement, MST-Didactic, and MST Preceptor.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

MST DIDACTIC

- Medicare Guidelines
- Clinical Documentation
- Consultant Recommendations
- Physicians Orders
- Medication Administration and Management
- Pharmacy Communication and Procedures
- Dietary Communication and Procedures
- Medical Record Audits
- Transfers and Discharges of Patients
- Laboratory Procedures
- Medical Imaging Procedures
- Pain Management
- Psychotherapeutic Medication Management
- Management of Patients with Dementia
- Oxygen Use and Storage
- Specialty Beds
- Orbits and Ordering of Over the Counter Medications
- Incontinence Care and Products
- Catheter, Ostomy and Rectal Tube Care
- IV Therapy
- Central Line Management
- Wound Vac Therapy
- Patient and Family Education
- Tracheostomy Training
- Wound Care Management
- Advanced Directive/End of Life Care
- Assessment and Reassessment of the Patient
- Care Path's for Patient Care
- Enteral Feedings
- Nursing Diagnosis
- Narcotic Count, Management and Documentation
- Discharge Planning
- Behavior Monitoring and Management
- Informed Consent
- Therapy Services
- Hospice Services
- Infection Control
- Risk Management
- Ancillary Services
- Ombudsman Program
- Restorative Nursing Program
- Diabetic Management

- Fall Program
- Bowel and Bladder Management
- Renal Dialysis Care and Fluid Management
- Hydration Program
- Nutrition and Weight Management
- Refusal of Treatment
- Contracture Prevention
- Activities of Daily Living Care and Management
- Serving Meal Trays and Calculating Meal Percentage
- Feeding a Patient
- Oral Care
- Denture Care
- Applying a Gait Belts
- Donning and Doffing Gloves
- Double Bagging and Linen Handling
- Catheter Care
- Bedpan and Urinal Management
- Transferring to a Chair or Wheelchair
- Transferring to a Bed or Toilet
- Turning and Repositioning
- Logrolling and Dangling a Patient
- Giving a Bed Bath
- Giving a Shower
- Perineal Care
- Shaving a Patient
- Nail and Foot Care
- Vital Signs
- Cast Care
- Body Mechanics
- Oxygen Use, Application and Storage
- Universal Precautions
- Code Blue
- Fluid Restrictions
- Modified Therapeutic Diets
- Pain Management-Non Pharmacological approaches
- Dementia
- Behavior Management
- Concentrator and Regulator Use
- Specialty Beds and How to Operate them
- Skin Care
- Hair Care

MST PRECEPTOR

- Wound Care
- IV and Central Line Access
- Medication Administration and Management
- Nursing Diagnosis
- Laboratory Skills
- Enteral Feedings

- Tracheostomy Care
- Restorative Nursing Program
- Assessment and Reassessment of Patient
- Diabetic Management
- Renal Dialysis and Fluid Management
- Infection Control
- Pain Management
- Therapy Services
- Nutrition and Weight Management
- Clinical Documentation

BUSINESS SKILLS

- Communication
- Conflict Management
- Time Management
- Residents Rights
- Appointment Scheduling
- AMA Procedure (leaving against medical advice)
- External Evacuation Procedures
- Security
- MSDS

COMPUTER SKILLS

- Microsoft Office (Intermediate/Advanced)
- Electronic Management Records System (EMR)
- Point Click Care Electronic Health Record
 - Resident Data
 - Medical Diagnosis
 - Structured Progress notes
 - Progress Notes, Care Plans and Care Plan Reviews
 - Kiosk Management
 - Risk Management
 - 24 Hour and Midnight Census Reports
 - POC Reports
 - Billing

CONTINUOUS IMPROVEMENT

- Medication Inventory Control
- QAA Roles, Responsibilities and Implementation
- Supervision of Patient Care
- Leadership/Employee Management
- Patient Safety
- Patient and Family Satisfaction
- Accident and Incident Management
- Team Building
- Admissions
- Room Readiness/Terminal Cleaning
- Rules of 3
- Pocket Care Plans

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



Training Proposal for:
Dole Packaged Foods, LLC
Agreement Number: ET15-0431

Panel Meeting of: April 24, 2015

ETP Regional Office: Sacramento

Analyst: K. Smiley

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Merced and San Joaquin	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No San Joaquin Location, General Teamsters Local No. 439			
Number of Employees in:	CA: 1,203	U.S.: 50,027	Worldwide: 100,289	
<u>Turnover Rate:</u>	2%			
<u>Managers/Supervisors:</u> (% of total trainees)	0%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$581,400		\$157,080 30%	\$0		\$424,320

In-Kind Contribution:	100% of Total ETP Funding Required	\$591,100
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills, Continuous Impr, Mfg Skills, HazMat	476	8-200	0	\$768	\$15.07
				Weighted Avg: 61			
2	Retrainees Priority Rate	Computer Skills, Continuous Impr, Mfg Skills, HazMat	51	8-200	0	\$1,152	\$15.07
				Weighted Avg: 64			

Minimum Wage by County Job Numbers 1 & 2: \$15.07 for Merced & 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

Health Benefits of up to \$3.07 per hour for Job Number 1 and \$2.07 per hour for Job Number 2 may be used to meet the post-retention wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Front Line Staff		154
Administration Staff		31
Warehouse Workers		64
Production Lead		78
Laboratory Technician		41
IT Staff		15
Field Representatives		32
Maintenance Workers		69
Electricians		27
Engineers		16

INTRODUCTION

Dole Package Foods, LLC (Dole) (www.dole.com) is a wholly-owned subsidiary of Dole Food Company, Inc., founded in 1851. Dole is a worldwide producer of fruits, vegetables, and packaged vegetable products. The Company produces over 300 products that are sold worldwide. Dole products are sold to food service distributors, grocery stores, and club stores.

Dole is eligible for standard retraining for companies meeting the definition of an industry, such as Manufacturing, deemed by the Panel as facing out-of-state competition. Training will be provided to trainees at the Stockton and Atwater locations.

PROJECT DETAILS

In 2011, Dole committed to a three-phase training plan that would allow for incumbent workers to improve their skills and promote into higher skilled positions. This plan anticipated hiring as many as 75 new employees to increase the Company's production and enhance their ability to compete in a global market.

In its prior ETP Agreement ET11-0305, Dole enacted the first phase of this plan during which time it hired 75 new employees as anticipated. Training focused on the dairy branch which was part of an asset purchase at the Stockton facility. Dole also expanded the Atwater location and added \$3.5 Million in new equipment.

Dole's enacted the second phase in its recent ETP Agreement ET13-0283 which focused on incumbent staff at facilities in Merced, San Joaquin and Ventura counties. The training focused on improving efficiencies and lowering human error with courses such as Manage Your Daily Schedule and Computer Numeric Control. They also focused on developing internal subject matter experts to cross-train between departments. These internal subject matter experts have lessened Dole's need for outside vendors.

This proposal is intended to accomplish the final phase of the training plan and will build upon the previous training. Administration Staff will train on the new Learning Management System, Inquisiq R4. The Company will also train workers on newly purchased and relocated equipment (processing conveyors, case coders, and computer software).

Training Plan

Computer Skills (15%): Training will be provided to all staff to improve knowledge of internal software programs, inventory tracking, and employee management. Training topics will include Share Point, SAP, and Halogen.

Manufacturing Skills (25%): Training will be provided to all staff to improve facility operations. Training topics will include, Operating Standards, Equipment Overhaul and Equipment Specifications. Topics will give trainees a deeper understanding of facility down time for fiscal responsibility.

Continuous Improvement (50%): Training will be provided to all staff to improve regulatory reporting and quality control. Training topics will include, Strategic Thinking and Economics in a Global Economy. Courses will provide trainees with skills to help Dole compete in the global food industry.

Hazardous Materials Safety (10%): Training will be provided to Maintenance Workers, Front Line Staff, Warehouse Workers, Production Lead, Electricians, Engineers and selected IT Staff. This training is designed to ensure that Dole is in compliance with food industry regulations. This is not the full HazMat curriculum as would be required for certification, but training will be conducted by qualified instructors.

Commitment to Training

Dole 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. Dole invests \$250,000 per facility annually for training. Training provided includes facility operations, safety, ESL, laboratory training and leadership skills. These courses are offered in the form of Class/Lab Training and Computer-Based Training. This training is companywide, job specific and mandatory for all employees.

Dole has contracted with BLI Co. to oversee the administration portion of the ETP funded training. Dole has a detailed training plan and several trainers that are familiar with ETP record keeping. In Addition, Dole has several staff members that are dedicated to monitoring this project.

High Unemployment Area

The 527 trainees in Job Numbers 1 & 2 work in a High Unemployment Area (HUA) exceeding the state average by at least 25%. The Company's locations in Merced & San Joaquin Counties qualify for HUA status under these standards. However, Dole is not asking for a wage modification.

Impact/Outcome

Dole's expectations for training are to improve efficiency and safety among incumbent workers. They are also expecting to become more proficient competing in a global market.

Substantial Contribution

Dole is a repeat contractor with payment earned in excess of \$250,000 at the Atwater facility within the past five years. (See Prior Project Table.) Accordingly, reimbursement for trainees at the Atwater facility (Job Number 1) will be reduced by 30% to reflect the Company's \$157,080 Substantial Contribution to the cost of training. The Stockton facility has not earned over \$250,000 within the past five years and therefore, will not be subject to Substantial Contribution.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0283	Atwater, Stockton, & Westlake Village	01/26/2013-01/25/2015	\$598,644	\$598,644 (100%)
ET11-0305	Atwater & Stockton	06/25/2011-06/24/2013	\$270,000	\$252,000 (93%)

DEVELOPMENT SERVICES

Dole retained BLI Co. in Salida to assist with development of this proposal for a flat fee of \$6,000.

ADMINISTRATIVE SERVICES

Dole also retained BLI Co. to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

COMPUTER SKILLS

- SAP (Scheduling, Accounting, Payroll) Tracking & Inventory
- Novatime
- Inquisiq R4-Learning Management System
- Halogen – Human Resources
- Share Point – Document Share (Cloud/Microsoft Platform)

CONTINUOUS IMPROVEMENT

- Regulatory Reporting/Tracking
- Quality Control
- Policy and Procedure Implementation Itochu
- Strategic Thinking
- Communicate with Workgroups
- Economics in a Global Economy
- Problem Solving
- Decision Making
- Train the Trainer

MANUFACTURING SKILLS

- Operation of an Ammonia Refrigeration Plant
- Automated Numeric Control
- Equipment Specifications, Start-Up and Installation
- Equipment Overhaul
- Operating Standards
- Programmable Logic Controller (PLC) Operations and Troubleshooting

HAZARDOUS MATERIALS

- Hazardous Material Handling

Note: Reimbursement for retraining is capped at 200 total hours per trainee, regardless of method of delivery.
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GENERAL TEAMSTERS LOCAL No. 439

(San Joaquin, Calaveras, Tuolumne, Amador and Alpine Counties)

Affiliated with the International Brotherhood of Teamsters

Ken Guertin
Principal Officer

Gabriel Salcido
President

Officers

Roger Olivas, Jr.
Vice President

March 16, 2015

Jon Formati
Recording-Secretary

Trustees

Roger Olivas, Jr.
Vice President

Employment Training Panel
1100 "J" Street
Sacramento, CA 95814

Gilbert Avila
Trustee

RE: Participation in the California Employment Training Panel

Ron Finch
Trustee

Dear Employment Analyst:

As the exclusive representative of the employees of Dole Packaged Foods, we support the participation of our members in the training to be provided in the ETP project and support the employer receiving funding for such training. As the Local Union representing the employees of Dole Packaged Foods we also support the training as it is a level of training that we do not offer internally because it is specific to each plant's environment.

Sincerely,

Gabriel Salcido
President

GS:jsj

cc: Michael G.C. McKague, DOLE Director of Operations
Via Facsimile 209-944-9679

www.teamsters439.com

1531 E Fremont St. • Stockton, CA 95205 • (209) 948-9592 • Fax (209) 948-3424



RETRAINEE - JOB CREATION

Training Proposal for:

**Lancaster.Burns Construction, Inc. dba
LB Construction, Inc.**

Agreement Number: ET15-0432

Panel Meeting of: April 24, 2015

ETP Regional Office: Sacramento

Analyst: L. Fraizer

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	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: 250	U.S.: 250	Worldwide: 250
<u>Turnover Rate:</u>	15%		
<u>Managers/Supervisors:</u> (% of total trainees)	1%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$140,280		\$0	\$0		\$140,280

In-Kind Contribution:	100% of Total ETP Funding Required	\$190,280
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TRAINING PLAN

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, OSHA 10/30, PL-Comm. Skills	130	8-200	0	\$756	\$15.07
				Weighted Avg: 42			
2	Retrainee Priority Rate Job Creation	Business Skills, Commercial Skills, Computer Skills, OSHA 10/30, PL-Comm. Skills	50	8-200	0	\$840	\$12.33
				Weighted Avg: 42			

Minimum Wage by County: Job Number 1: \$15.07 per hour; Job Number 2(Job Creation): \$12.33 per hour for Placer 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

Job Number 1: Up to \$3.32 per hour may be used to meet the Post-Retention Wage; Job Number 2: up to \$1.33 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		9
Accountant		3
Sales Representative		3
Marketing Representative		4
Customer Service Representative		7
Production Staff		30
Warehouse Staff		14
Technical Staff		14
Engineer		16
Project Coordinator		16
Project Manager		14
Job Number 2		
Administrative Staff		2

Accountant		2
Sales Representative		2
Marketing Representative		2
Customer Service Representative		2
Production Staff		15
Warehouse Staff		4
Technical Staff		6
Engineer		5
Project Coordinator		4
Project Manager		6

INTRODUCTION

Founded in 1991 and headquartered in Roseville, Lancaster. Burns Construction, Inc. dba LB Construction, Inc. (LBC) (www.lbconstructioninc.com) fabricates and constructs steel foundations, drywall, rough carpentry, wood, and metal stud install-ready assemblies. Customers include domestic general contractors in the construction industry.

To meet customer demands in a highly competitive industry, LBC is expanding into new markets, developing new products, and upgrading software and technical skills. LBC plans to upgrade its steel fabrication division, maintain Green Leadership in Energy and Environmental Design (LEED) accreditation introduce Computer-Aided Design/Computer-Aided Manufacturing (CAD/CAM) 2012 advancements, and implement continuous improvement techniques. ETP funds will assist the Company in meeting customer demands, remaining competitive, and ensuring project integrity.

Need for Training

This is LBC's second ETP Agreement. Training under the previous agreement focused on Continuous Improvement to reduce production lead-time, scrap and rework. Training also focused on Commercial Skills for the in-house LEED accreditations, and Business Skills. LBC has recently purchased new equipment including: a Hyd-Mech band saw for cutting raw steel; wire feeders for the final assembly of steel structures; and a trucking freightliner that provides direct route delivery to jobsites.

The Company is upgrading its Steel Fabrication division by integrating FabSuite software to combine estimating, drawing and nesting purchases into one system. The Company is also upgrading its Design and Engineering units with special CAD/CAM software for 3D modeling, mold design and machining. In addition, LBC has equipped its shop with the most current tools available in the industry.

Each trainee will receive training not covered in the previous ETP-funded training program with a focus on safety skills, more complex products, computer system upgrades, and new equipment and processes.

Retrainee - Job Creation

LBC's Northern California clients have increased, and the Company is in the process of acquiring industry-specific certifications to maintain critical production methodologies. The newly hired workers need training in state-of-the-art tools and equipment, as discussed earlier.

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

LBC has committed to hiring 50 new employees (Job Number 2). The Company represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

Training Plan

Business Skills (25%): Training will be provided to all occupations and will provide efficiencies of all project aspects from the onset of bidding, to post-installation client services. This will help reduce labor cost and material waste, and provide effective people management.

Commercial Skills (25%): Training will be provided to Managers, Production and Technical Staff. Training will help the Company achieve industry certification in American Institute of Steel Construction Certification and meet demands of the growing Los Angeles client base through City of Los Angeles Certification. Advanced assembly, equipment and production training will enable workers to fully utilize the Hyd-Mech Band Saw and wire feeders, reduce scrap, rework and lead-times.

Computer Skills (15%): Training will be provided to all occupations and will enable the Company to integrate 3D modeling software applications to support the Steel Fabrication Division. Topics will include PlanGrid, FabSuite and Advanced Microsoft Office.

Productive Laboratory-Commercial Skills (35%)

The Panel recently adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

According to LBC, Technical, Warehouse, Engineering, Project Management and Coordinators, and Production Staff will need PL-Commercial Skills training to successfully operation of all the equipment in the production process. PL training will provide trainees the proper way to navigate and integrate software upgrades into existing processes, operate equipment, make needed adjustments and perform basic troubleshooting. Certain functions can only be performed in a live setting and are not available in a simulated lab environment. LBC states that trainers are subject matter experts in their field.

LBC is requesting up to 35 hours with a trainer-to-trainee ratio of 1:3. Many of LBC's projects are large scale and require larger production crews on one project. Installing these large structures requires a crew of at least 4 to 5 employees. This coordinated production process requires a supervisor, someone handling the heavy material with equipment, another rigging the material, and two journeymen putting material into place. Other projects demand crews work in sets of 4 to 5 on different floors or areas working simultaneously. Training 1:1 or 1:2 cannot be done in many of LBC's production processes due to safety issues and decrease in productivity.

Production is expected to slow down during training, but become more efficient after training is complete. As efficiencies increase, employees will be able to make up for lost production. The trainees' skills are assessed by ability to perform a function at the onset of training, through observation by the trainer until deemed competent in skills by error free implementation in a live

setting. After training the supervisor observes trainee performance, performs quality control checks and test finished products for tolerances and criteria required.

Certified Safety Training

LBC's clients require employees to obtain certified OSHA training. Certification will assist the Company to meet current bidding requirements and obtain new contracted projects. Key field, project management and administrative employees will be trained to provide clientele with a safe working environment. This also helps LBC mitigate risk and ensure an injury-free work zone.

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

Commitment to Training

LBC currently has an annual training budget of \$50,000, which includes companywide continuous improvement training and employee orientation; job specific training encompasses LEED training, and basic skills for entry level positions.

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

➤ Training Infrastructure

The Company President and Vice President of Operations, Human Resources Manager, Training Manager, and Departmental Managers who will be responsible for scheduling training, collecting completed rosters and sending to the corporate office. LBC is using Sallyanne Monti Consulting as their contract administrator for the enrollment and tracking of trainee hours.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0211	Roseville	11/19/2012- 11/18/2014	\$99,900	\$97,868 (98%)

DEVELOPMENT SERVICES

Sallyanne Monti Consulting in San Francisco assisted with development of this proposal for a flat fee of \$4000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Performance Management

COMMERCIAL SKILLS

- Advanced Assembly Techniques
- Advanced Production Techniques
- Equipment operations for Upgrades
- Industry Certifications (American Institute of Steel Construction Certification & Los Angeles City Certification)

COMPUTER SKILLS

- Computer-Aided Design/Computer-Aided Manufacturing, 3D Modeling, TELKA Structures 20 & ZW3D Software
- Dell PowerEdge R720 File Server
- FabSuite
- Microsoft Office Suite (Intermediate & Advanced)
- PlanGrid Mobil Deployment Software

0-30

OSHA10/30 (OSHA Certified Instructor)**E-Learning Hours**

8 – 200

BUSINESS SKILLS

- Performance Management

COMMERCIAL SKILLS

- Advanced Assembly Techniques
- Advanced Production Techniques
- Equipment operations for Upgrades
- Industry Certifications (American Institute of Steel Construction Certification & Los Angeles City Certification)

COMPUTER SKILLS

- Computer-Aided Design/Computer-Aided Manufacturing, 3D Modeling, TELKA Structures 20 & ZW3D Software
- Dell PowerEdge R720 File Server
- FabSuite
- Microsoft Office Suite (Healthcare interface & reporting interface)
- PlanGrid Mobil Deployment Software

Productive Lab

0 – 35

COMMERCIAL SKILLS (Ratio 1:3)

- Conventional Roof Structures & Decking Procedures
- Frame Structural Members & Installation
- Stair Structures Processes
- AWS D1.1 Welding Code Procedures & Fabrication
- Blueprint/Layout Processes
- Paint Application
- Paint and Rust Removal
- Construction Equipment Usage

Safety Training is capped at 10% of total training hours, per trainee.

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



RETRAINEE - JOB CREATION

Training Proposal for:

Mary Ann's Baking Co., Inc.

Agreement Number: ET15-0433

Panel Meeting of: April 24, 2015

ETP Regional Office: Sacramento

Analyst: L. Fraizer

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate HUA	Industry Sector(s):	Manufacturing 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: 107	U.S.: 107	Worldwide: 107	
<u>Turnover Rate:</u>	15%			
<u>Managers/Supervisors:</u> (% of total trainees)	9%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$424,616		\$0	\$0		\$424,616

In-Kind Contribution:	100% of Total ETP Funding Required	\$542,086
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, PL-Commercial Skills	57	8-200	0	\$1,800	\$15.75
				Weighted Avg: 100			
2	Retrainee HUA Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, PL-Commercial Skills	44	8-200	0	\$1,764	\$11.81
				Weighted Avg: 98			
3	Job Creation Initiative HUA Priority Rate Retrainee	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, PL-Commercial Skills	94	8-200	0	\$2,600	\$10.50
				Weighted Avg: 130			

Minimum Wage by County: Job Number 1: \$15.75 per hour; Job Number 2(HUA) \$11.81 per hour; Job Number 3(Job Creation/HUA): \$9.84 for Job Number 3 in 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 \$1.56 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 and 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		7
Sales Staff		3
Research/Development Staff		3
Quality Assurance Staff		8
Manufacturing Staff		96
Machine Operators		28
Maintenance Staff		12
Sanitation Staff		14
Logistics/Shipping Staff		7
Managers/Supervisors		17

INTRODUCTION

Founded in 1961 and located in Sacramento, Mary Ann's Baking Co., Inc. (MABC) produces a variety of fried and baked products for distribution in the continental United States, Alaska, Hawaii, Canada and Mexico. The Company's products are transported and distributed in both fresh and frozen conditions. Customers include independent distributors (Regal Foods, Reser's, Bailey's, Nasser, Alpine, 3 J's), grocery chains (Kroger, Food For Less, Grocery Outlet, Food Lion), and school districts.

Need For Training

To compete in the baked and fried goods market, MABC is continually implementing technological plant improvements and adding new production lines. The Company has also continued to purchase new equipment and software for this purpose. These changes include the following:

- A yeast-raised production line installed in 2014 for raised donuts, fritters, jelly donuts and other fried sweet goods.
- A muffin production line is nearing completion for specialty muffins and loaf cakes.
- "Just Food' Bakery Manufacturing Operating Software will be installed in Fall 2015. This is a software program that will allow personnel to input data, analyze results and improve operations.

In addition, the Company has completed the British Retail Consortium (BRC) Global Standard for Food Safety process and has been certified by BRC for Food Safety. This certification will allow MABC to pursue business anywhere in the world.

These adaptations require changes in the employee's current skills. ETP-funding will help the Company improve its competitive edge by adding new products, improving operations, and increasing maintenance knowledge. In addition, training is needed to maintain and renew the BRC Certification.

PROJECT DETAILS

This is the second proposal for MABC. New employee training will focus on skill sets from MABC's current curriculum, while current employees will focus on continuing training efforts started under the previous Agreement. All trainees will receive training on product lines and the 'Just Foods' manufacturing system.

Retrainee - Job Creation

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

MABC has committed to hiring 94 new employees (Job Number 3). MABC stated that 30 of the new employees will fill positions lost. Over the next two years, the Company will add a minimum of one shift to each production line and up to two shifts for several other production lines. The Company has a goal of obtaining 100% of the production capacity to increase production while

improving efficiency. The recall of workers previously let go is permissible as “net new jobs” per Panel guidelines.

The new technology, production lines, and production increase will require hiring new employees. MABC represents that the date-of-hire will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Based on assessments conducted by MABC, training will be delivered in a classroom/laboratory and productive laboratory setting in the following types of training.

Business Skills (10%): Training will be offered to Administrative and Sales Staff. Training will include Accounting, Sales, Communication and Customer Service Skills. This training will help expand the Company's customer base, improve accounting expertise, develop marketing strategies, and provide superior customer service.

Commercial Skills (30%): Training will be offered to all occupations on the production floor via a combination of classroom and Productive Laboratory training. Administrative and Sales Staff will receive this training due to BRC Standards required as part of the Global Food Safety Initiative. Training will include operation, repair and/or maintenance of equipment, and labeling requirements. Productive Laboratory training will be provided to ensure a full understanding of equipment and production processes. Training also includes BRC Certification.

Computer Skills (20%): Training will be offered to all occupations. Training will provide accurate documentation on production, complete reports quickly and proficiently, and use new software to provide a “state-of-the-art” bakery production system. Training will also cover advanced Microsoft Office to increase output and accuracy of daily tasks. .

Continuous Improvement (30%): Training will be offered to Managers/Supervisors, Administrative, Sales, Research, Development, and Quality Assurance Staff. Employees will receive training in Leadership, Root Cause Analysis, Team Building, Problem-Solving and Eliminating Waste. These skills will enable the workforce to perform more effectively in team environments, implement new working processes, reduce waste and scraps, improve leadership capabilities, and increase product quality.

Hazardous Materials (10%) Training will be offered to Managers/Supervisors, Maintenance, Sanitation, Quality Assurance and Logistics Staff. Training will include Chemical Handling, Waste Management, and Hazard Analysis and Critical Point Control. Training will help prevent biological, chemical and physical hazards during the production process.

Productive Laboratory

The Panel recently adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

Training will be offered to Machine Operators, Maintenance, Sanitation, Manufacturing and Logistics Staff. PL training will supplement class/lab training to improve operation, preventative maintenance, setting changes and trouble shooting. The Company also purchased a new product line that will require PL training on new processes. Equipment will include but is not limited to: Muffin Line, Raised Product Line, and Danish Line.

Newly hired employees will receive up to 50 hours of PL training, which is within Panel standards for this size company. Newly hired employees are inexperienced and require hands-on training to successfully learn the operations and production process of the old and new equipment. Trainers will be experts in the course topics and provide work instructions of the process prior to observing the trainee perform the task.

In addition, the trainer will direct and provide feedback to the trainee as the work is performed. Trainees will be deemed competent based on their level of efficiency and knowledge of the equipment. The trainer-to-trainee ratio will not exceed 1:1. During training, production is expected to decrease while labor cost and defects are expected to increase.

Substantial Contribution

MABC is a repeat contractor with payment earned in excess of \$250,000 at the Sacramento facility within the past five years. Although the Company earned over \$250,000, a portion of their payment earned was for the job creation component. Therefore, the Company will not be subjected to substantial contribution.

High Unemployment Area

The trainees in Job Numbers 2 and 3 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's location in Sacramento qualifies for HUA status under these standards.

➤ Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. MABC is asking for a wage modification for trainees in Job Number 2 from \$15.75 to \$11.81, and in Job Number 3 from \$13.13 to \$10.50.

Commitment to Training

MABC represents that ETP funds will not displace its existing financial commitment to training. The Company currently has an annual training budget of \$230,000, which include state mandated safety training, new employee orientations, sexual harassment prevention, CPR, forklift training/certification, HACCP training and plant machine operation/maintenance. The company focuses on continual training to develop a team approach, improve transparency and increase job satisfaction.

ETP training funds will provide the Company with the tools to achieve its goals to be a competitive and growing company within the community. MABC represents that safety training is provided in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0173	Sacramento	10/01/12 – 09/30/14	\$367,360	\$324,873 (88%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Advanced Accounting
- Sales Skills
- Customer Service
- Communication Skills
- Business Performance (Budgets)

COMMERCIAL SKILLS

- Forklift Training
- Labeling Requirements
- New Muffin Line Equipment Training
- New Raised Product Line Equipment Training
- Existing Danish Line Equipment Training
- Equipment Preventative Maintenance
- Equipment Troubleshooting/Repair
- BRC Standards Training/Maintenance

COMPUTER SKILLS

- Programmable Logic Controls Programming
- Just Food Phase 2 Training
- Computer-Aided Design
- Advanced Microsoft Office/Outlook
- MP-2 (Maintenance/Sanitation Software Programming)

CONTINUOUS IMPROVEMENT

- Statistical Analysis
- Leadership
- Root Cause Analysis
- Team Building
- QC – Data Collection
- Problem Solving
- Eliminating Waste
- Improving Workflow
- Coaching
- Decision Making

HAZARDOUS MATERIALS

- Chemical Handling
- Waste Management (New Waste Byproducts)
- HACCP Training

Productive Lab Hours

0-50

COMMERCIAL SKILLS (Ratio 1:1)

- Forklift Training
- New Muffin Line Equipment Training
- New Raised Product Line Equipment Training
- Existing Danish Line Equipment Training
- Equipment Preventative Maintenance
- Maintenance Troubleshooting/Repair
- BRC Standards Training/Maintenance
- Standard Sanitation Procedures
- Standard Equipment Operations

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

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



RETRAINEE - JOB CREATION

Training Proposal for:

MedAmerica Billing Services, Inc.

Agreement Number: ET15-0430

Panel Meeting of: April 24, 2015

ETP Regional Office: Sacramento

Analyst: A. Greene

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Retrainee HUA SET	Industry Sector(s):	Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Stanislaus, 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: 812	U.S.: 894	Worldwide: 3,083
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$420,000		\$0	\$0		\$420,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$2,508,460
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Job Creation	Business Skills, Commercial Skills, Computer Skills	40	8-200	0	\$2,000	\$12.33
				Weighted Avg: 100			
2	Retrainee SET/HUA Job Creation	Business Skills, Commercial Skills, Computer Skills	20	8-200	0	\$2,000	*\$10.00
				Weighted Avg: 100			
3	Retrainee SET/HUA	Business Skills, Commercial Skills, Computer Skills	250	8-200	0	\$1,200	\$11.30
				Weighted Avg: 80			

*It will be made a condition of contract that the trainees will never be paid less than the statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

Minimum Wage by County: Job Number 1 (Job Creation): \$12.33 in San Bernardino County; Job Number 2 (Job Creation/HUA): \$9.25 in Stanislaus County; Job Number 3 (HUA): \$11.30 in Stanislaus 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 \$0.33 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Up to \$1.30 per hour may be used to meet the Post-Retention Wage in Job Number 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Medical Billing Specialists		40
Job Numbers 2 & 3		
Medical Billing Specialists		215
Payment and Refund Specialists		10
Medical Coding Specialists		25
Quality Assurance Analysts		20

INTRODUCTION

Founded in 1975, MedAmerica Billing Services, Inc. (MedAmerica) provides medical coding and billing services including custom electronic submission of claims, auditing, accounts receivable management, physician coding, documentation education, and custom data analysis services.

MedAmerica serves over 115 customer locations in nine states, with approximately 4.3 million patients and over \$2.5 billion in physician charges per year. The Company provides services to customers in practice areas such as emergency medicine, hospitalist, wound care, urgent care, radiology, physical therapy and family practice.

MedAmerica has adapted to the ever-changing medical billing environment by modifying and adding services to meet customer needs. A focus on employee education, coupled with advanced IT capabilities, has positioned the Company to operate successfully in a climate of increased governmental regulations and third party contracting.

Need for Training

This will be MedAmerica's fourth ETP-funded training.

Medical billing and coding is a growing industry that requires a broad skillset. MedAmerica hires employees with limited skills and provides the skills needed to become proficient in the industry. Training will focus primarily on the Company's recently expanded billing and coding training program. The program implements the use of modern training methods and up-to-date material to give more real-world training. The updated subjects are more in line and relevant to the current business model.

Training is delivered in three phases. Phases 1 and 2 take approximately three weeks each to complete, and Phase 3 takes one week. Trainees graduate to the next phase when they meet the expected progress level. Progress levels are determined through weekly assessments of work produced in class. Bi-weekly evaluations are also prepared on each trainee to evaluate the material covered, retention of material covered, and process applied. If trainees do not meet the progress level expectation, they may remain for additional training until ready to begin the next phase.

In addition, the Company has a need to train all medical coders on the International Statistical Classification of Diseases and Related Health Problems 10th Revision (ICD-10) to stay compliant with the new regulations. This adds new training requirements for upgraded skills in areas such as auditing, charting, coding, insurance, and related billing.

All training is provided by full-time MedAmerica trainer, at the Company's location in Stanislaus County. Classes are held in dedicated training rooms equipped with computers and dual monitors for each trainee. Class size is a maximum of 12 employees with 2 or more trainers in the classroom depending on phase of class and number of retrainees.

Retrainee – Job Creation

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

MedAmerica is experiencing significant growth. Growth is measured in terms of patient volume and this has increased an average of 13% each year between 2011 and 2014. The Company's estimated growth for 2015 is anticipated to be 11%.

To meet demand, MedAmerica anticipates hiring 60 new employees (20 at their Modesto location and 40 at their Ontario location). In preparation for new staff, the Company has leased an additional 39,000 square feet of building space in Modesto, and have increased the Ontario facility space an additional 5,000 square feet.

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

PROJECT DETAILS

MedAmerica proposes to train 310 employees. All occupations will receive training in each of the topics below as necessary to gain the skills to perform their job functions.

Business Skills (10%) – Training in customer service skills will be offered to all occupations. This training is intended to support MedAmerica's commitment to excellent customer service and ensuring that each customer receives a personalized approach.

Commercial Skills (80%) – Training will be offered to all occupations. Topics include training in Medical Coding, Auditing, Payment Posting, and Refund Processes. Training will provide the skills needed for trainees to keep pace with the ever-changing medical billing environment.

Computer Skills (10%) – Training on LaserFische and Lynx software programs will be offered to all coding occupations. Training will provide skills for trainees to effectively utilize and run specialized reports as necessary to perform job functions.

Commitment to Training

In 2014, MedAmerica invested \$1,837,700 in training. The Company provides ongoing training in basic employee orientation, basic billing functions, overview of policies and procedures, Health Insurance Portability and Accountability Act (HIPAA), basic billing terminology, diversity training, management seminars and leadership skills, employment law and billing specialist refresher training. The Company will continue to provide this ongoing training at its own expense during the term of the ETP contract and beyond.

MedAmerica represents that ETP funds will not displace the existing financial commitment to training.

➤ Training Infrastructure

Three members of MedAmerica's Human Resources Department will manage the administrative functions of the training program such as uploading enrollment and attendance data. The training managers will schedule the trainings and oversee training documentation requirements.

SET/HUA

As a healthcare service provider with clients primarily in California, MedAmerica does not face out-of-state competition. As such, it will be funded under Special Employment Training (SET). Under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention.

The trainees in Job Numbers 2 & 3 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 15%.

The Company's location in Stanislaus County qualifies for HUA status and 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. MedAmerica is requesting this wage modification for Job Numbers 2 & 3.

Impact/Outcome

Training is intended to increase production capacity and facilitate growth in order to stay competitive.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ (%)
ET11-0130	Modesto	12/9/2010- 12/8/2012	\$135,810	\$130,851 (96%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service Skills

COMMERCIAL SKILLS

- Accounts Receivable
- Assessment/Audit Skills
- Billing Development and Procedures
- Chart Documentation
- Detecting Non-Compliant Medical Billing
- Electronic Funds Transfer Skills
- Forms/Tracking/Documentation Skills
- ICD-9 and ICD-10 Classification Skills
- Insurance Billing System Skills
- Insurance Classification Skills
- Insurance Payment System Skills
- Medical Coding Skills
- Medical Knowledge Skills
- Medical Terminology Skills
- Payment/Reconciliation Skills
- Refund Skills
- Understanding Evidence of Coverage

COMPUTER SKILLS

- Lynx and LaserFische Software Skills

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



RETRAINEE - JOB CREATION

Training Proposal for:

Valley Truck and Tractor Co.

Agreement Number: ET15-0435

Panel Meeting of: April 24, 2015

ETP Regional Office: Sacramento

Analyst: M. Mazzone

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative HUA	Industry Sector(s):	Agriculture Retail Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Butte, Colusa, Glenn, Sacramento, Solano, Sutter, Yolo	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: 157	U.S.: 157	Worldwide: 157
<u>Turnover Rate:</u>	11%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$239,520		\$0	\$0		\$239,520

In-Kind Contribution:	100% of Total ETP Funding Required	\$315,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., Management Skills	133	8-200	0	\$1,440	\$15.75
				Weighted Avg: 80			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., Management Skills	30	8-200	0	\$1,600	\$13.13
				Weighted Avg: 80			

Minimum Wage by County: Job Number 1: \$15.07 per hour for Butte, Colusa, Glenn, Solano, Sutter and Yolo counties; \$15.75 per hour for Sacramento County

Job Number 2 (Job Creation): \$12.33 per hour for Butte, Colusa, Glenn, Solano, Sutter and Yolo counties; \$13.13 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 \$0.25 per hour may be used to meet the Post-Retention Wage for Job Number 1 and up to \$1.13 may be used to meet the Post-Retention wage for Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		15
Manager		27
Parts Staff		15
Sales Representative		17
Technician		56
Job Number 2		
Administrative Staff		4
Manager		4
Parts Staff		7
Sales Representative		6
Technician		9

INTRODUCTION

Founded in 1948, Valley Truck and Tractor Co. (VT&T) is an agricultural vehicle dealer in the Sacramento Valley (<http://valleytruckandtractor.com/>). VT&T sells and services commercial and residential agricultural equipment including tractors; combines and sprayers; riding mowers, utility tractors and snow equipment; and specialized golf course and turf equipment. In addition to equipment sales, VT&T supports John Deere Agriculture Management Solutions, which assists farmers with the management of their crops by using technology and GPS.

VT&T customers include farmers, commercial landscaping companies, residential customers and golf courses. There are 10 VT&T locations in the Sacramento Valley including: Chico, Colusa, Dixon, Elk Grove, Gridley, Robbins, Willows, Woodland, and Yuba City (headquarters). All locations will participate in ETP training.

VT&T is eligible for standard retraining as a company primarily engaged in providing services directly to customers located both inside and outside of California.

PROJECT DETAILS

The Company's largest training needs are Business and Commercial skills required to service customers effectively. To meet these needs and increase competitiveness, VT&T has developed a training plan, which will focus on these improvements.

A major component of VT&T's business is built around the sale and service of John Deere farm equipment. To promote the efficient use of resources John Deere has developed Farmsight, which uses GPS mapping and technology on farm equipment. The technology will remotely operate the equipment with or without an operator and can level the land, till, plant, spray and harvest. Farmsight will also compile farm data on soil grids, soil samples, automated crop reporting, and it works seamlessly with John Deere's Apex Farm Management Software.

This technology is new for John Deere and VT&T staff. VT&T employees will receive training from product knowledge and sales through parts and repair services. In addition to the training on John Deere equipment and software, VT&T staff will receive training in a new Customer Relationship Management system (CRM), Customer Service Skills, Sales and Marketing, Lean Process Procedures and Management Techniques.

Retrainee - Job Creation

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

VT&T has committed to hiring 30 new employees (Job Number 2). The Company represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

VT&T will be offering new services to customers, which is focused on John Deere technology packages for use with John Deere equipment. The increase in services provided will require additional staff to market and sell the products. Staff will also be required to educate customers with regards to the benefits and operations of the new technology. The increase in services provided coupled with an aggressive plan to increase market share will expand VT&T's

business capacity and functions. The workforces at all 10 locations will be increased due to the business expansion.

Training Plan

Trainees will receive between 8-200 hours of Classroom/Laboratory or 8-60 E-Learning training in the following:

Business Skills (25%): Training will be delivered to all occupations and focus on product knowledge, customer service, sales and marketing, and business operation skills. Training topics includes Business Communications, Customer Relationship Management, Dealing with Difficult People, Cost Control, Marketing/Sales Techniques, Retaining Customers, Product Knowledge and Financial Analysis.

Commercial Skills (20%): Training will be delivered to all occupations, excluding Administrative Staff, and will increase staffs knowledge of equipment and parts. Training will focus on detailed equipment servicing instructions and the functionality of agricultural management systems. Topics will also include Parts Metric Analysis, Equipment Technical Overviews, Equipment Service and Field Adjustment Techniques, and Agriculture Management System/Technology Systems Function.

Computer Skills (20%): Training will be delivered to all occupations. Training will focus on the new CRM system and John Deere software programs. Training topics will include Customer TRAX, EQUIP, John Deere Farmsight, John Deere Agriculture Management System and Intermediate/Advanced Microsoft Office.

Continuous Improvement (25%): Training will be delivered to all occupations to improve efficiencies in all areas. Employee knowledge and skill enhancement will be emphasized in the continuous quality improvement initiative is being implemented by VT&T. Training topics include Problem Solving and Decision Making, Process Improvement, Project Management, Lean Process Procedures, Root Cause Analysis, Time Management and Production Operations/Workflow.

Management Skills (10%): Training will be delivered to Managers to foster a highly productive work atmosphere and to grow the talents of emerging leaders within VT&T. Training topics will include Coaching/Mentoring Skills, Effective Meetings for Managers, Finance for Technical Managers, Leadership Skills, Motivation Skills, Supervisory Skills, Teambuilding, Conflict Resolution Skills, and Project Management and Methodology.

Commitment to Training

VT&T currently has an annual training budget of \$20,000 per location and this includes state mandated safety training, new employee orientation and sexual harassment prevention. VT&T represents that ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

High Unemployment Area

Some trainees may work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. However, VT & T is not asking for a wage and/or retention modification.

Impact/Outcome

Training is expected to improve VT&T's competitiveness statewide. After the completion of training, VT&T will be able to service more customers in a greater range of products, which will lessen the amount of business that is lost to out-of-state competitors.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Sierra Consulting Services in Cameron Park assisted with development of this proposal for a flat fee of \$15,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Business Communications
- + Business Fundamentals
- + Business Writing
- + Behavior Style Strategies
- + Communication Skills
- + Creative Marketing
- + Customer Relationship Management
- + Customer Service Skills
- + Cost Control
- + Dealing with Difficult People
- + Financial Analysis
- + Interpersonal Communications
- + Marketing Techniques
- + Sales Techniques
- + Negotiating Skills
- + Operational Skills
- + Planning and Organization
- + Product Knowledge
- + Project Analysis and Specifications
- + Relationship Building

COMPUTER SKILLS

- + Intermediate and Advanced Microsoft Office
- + Customer TRAX
- + EQUIP
- + IT/Network Infrastructure
- + John Deere Farmsight
- + John Deere Apex
- + John Deere Agriculture Management System

CONTINUOUS IMPROVEMENT

- + Cross Training
- + Change Management
- + Creating a Quality Organization
- + Lean Process Procedures
- + 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
- ✚ Leadership Skills

MANAGEMENT SKILLS (Managers Only)

- ✚ Coaching/Mentoring Skills
- ✚ Effective Meetings for Managers
- ✚ Finance for Technical Managers
- ✚ Leadership Skills
- ✚ Motivation Skills
- ✚ Supervisory Skills
- ✚ Teambuilding
- ✚ Conflict Resolution Skills
- ✚ Project Management and Methodology

E-Learning Hours

8-60

BUSINESS SKILLS

- ✚ Sales Skills

COMMERCIAL SKILLS

- ✚ Parts Metric Analysis
- ✚ Equipment Technical Overviews
- ✚ Equipment Service & Field Adjustment Techniques
- ✚ Service Department Metric Analysis
- ✚ Dealership Performance Metrics

COMPUTER SKILLS

- ✚ Agriculture Management Systems Function

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



Training Proposal for:

El Camino Community College District, Center for Applied Competitive Technologies (CACT)

Agreement Number: ET15-0427

Panel Meeting of: April 24, 2015

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100	Industry Sector(s):	Manufacturing Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No United Steelworkers Local 675		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$607,200		\$42,150 8%		\$649,350

In-Kind Contribution:	50% of Total ETP Funding Required	\$835,640
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10, OSHA 30	540	8-200	0	\$770	\$15.07
				Weighted Avg: 40			
2	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10, OSHA 30	150	8-60	0	\$1,557	\$15.07
				Weighted Avg: 56			

Minimum Wage by County: \$16.44 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara Counties; \$15.97 per hour for Los Angeles County; \$16.02 per hour for Orange County; \$15.75 per hour for Sacramento County; \$15.93 per hour for San Diego County; \$15.56 for Alpine County and \$15.07 per hour for all other counties.

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

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

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

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Production		200
Clerks		90
Shop Leads/Operators		300
Administrative Staff Level 1		15
Administrative Staff Level 2		5
Engineer Level 1		15
Engineer Level 2		5
Manager/Supervisor Level 1		45
Manager/Supervisor Level 2		15

INTRODUCTION

Founded in 1947, El Camino Community College District, Center for Applied Competitive Technologies (El Camino CACT) is a two-year community college offering academic and vocational education programs. The college enrolls more than 25,000 students each semester and boasts a curriculum of over 850 highly regarded academic and career programs taught by exceptional faculty.

El Camino CACT is eligible for ETP funding as a community college. The core group of participating employers qualifies as priority industry manufacturers. The proposed training will be provided to employers statewide; however, most of the training is expected to take place in Los Angeles and Orange counties. The majority of training (99%) will be conducted at participating employer worksites; the remainder will be held at the campus in Hawthorne.

El Camino CACT's core group of participating employers consists of large and small manufacturers. Some core employers may have participated in at least one of El Camino CACT's previous agreements. In addition, several topics from the Curriculum are repeated from prior Agreements. However, El Camino CACT confirms that no trainees from previous participating employers will receive duplicative training in any subject matter.

PROJECT DETAILS

El Camino CACT is focused on helping manufacturing industry employers by providing training in new technology and innovative processes that can be applied to their current workforce. Training will also provide continuous skills upgrades essential to maintaining competitiveness. In addition, training is geared toward California manufacturers, an industry sector known to face stiff out-of-state competition.

The college has crafted a comprehensive training program that can be customized to meet specific employer needs.

Business Skills (10%) - Training will provide all trainees the skills necessary to improve communication, customer service, and presentation skills and enable employees to manage projects more effectively.

Computer Skills (7%) - Training will be delivered to all trainees to help them become more proficient in the use of enterprise and manufacturing management systems, engineering software, business reporting tools, E-Commerce and database applications.

Continuous Improvement (60%) - Training will be provided to all occupations. This training is designed to enhance workers' skills in the areas of problem solving, process improvements, Statistical Process Control, teambuilding, and frontline leadership.

Hazardous Materials (2%) - Training will include environmental management skills for Production Staff, Operators, Managers/Supervisors, and Engineers who develop and administer plans/systems for handling hazardous materials and industrial waste.

Literacy Skills (2%) - Training will be provided to Production Staff, Clerks, Shop Leads, and Operators. This training will enable employees with limited English skills to increase their speaking, listening, and comprehension skills in the workplace.

Management Skills (1%) - Training will provide Managers/Supervisors with leadership and supervisory skills to implement changes and become more effective leaders in high performance workplaces.

Manufacturing Skills (15%) – Training will provide Production Staff, Shop Leads, and Operators with skills pertaining to manufacturing and assembly, pneumatics, blueprint reading, and industrial maintenance. This training is designed to improve productivity, product quality, plant efficiencies, and reduce waste.

OSHA 10/30 (3%) - OSHA 10/30 is a series of courses “bundled” by industry sector and occupation. OSHA 10 will be provided to frontline Manufacturing Staff, Production Staff, Shop Leads, and Operators. OSHA 30 training will be provided to Managers and Supervisors to ensure a safe work environment.

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 toward construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
2. Hazardous Materials (HAZMAT). This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Production Staff, Operators, Managers/Supervisors, and Engineers who develop and administer plans/systems for handling hazardous materials and industrial waste will receive up to 200 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, certification is by the certified trainers.

Substantial Contribution

El Camino CACT serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer (over 100 full-time employees) has received the benefit of training with payment earned in excess of \$250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 30% to reflect that employer’s substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 50%. Small businesses with 100 or fewer full-time employees are not subject to this provision.

Active Contract

El Camino CACT has an active contract with ETP under the Alternative and Renewable Fuel and Technology Program (AB 118), running from August 5, 2013 to August 4, 2015 (ET14-0800). Of an estimated 500 trainees, 418 have been enrolled and 316 have received the required minimum hours of training.

Tuition Reimbursement

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

Commitment to Training

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

Some participating employers may have received ETP training in the past. However, several workers have not participated and will be receiving ETP-funded training for the first time. Trainees that have benefited from past ETP-funded training will be trained in new areas that further skills development and contribute to company growth.

Trainer Qualifications

El Camino CACT instructors, as well as other training vendors Cerritos College and Antelope Valley College trainers, are qualified professionals with both years of industry and teaching experience. Training will take place at the college's campus and participating employer locations.

El Camino College (CACT) also focuses on building partnerships with other community colleges and colleges that cannot afford the administration required to effectively run an ETP contract and anticipate that Antelope Valley College will deliver 6.2% of the training and Cerritos College delivering 37.5% of the training.

Training Coordinator

Eldon Davidson of El Camino CACT will be coordinating this ETP-funded project.

Marketing and Support Costs

El Camino CACT's marketing and recruitment efforts include networking with manufacturing clients and outreach to new employers. These efforts leverage the referrals made by economic development partners in the region, such as the South Bay Workforce Investment Board (WIB), California Manufacturing Technology Consulting, Pacific Gateway WIB, and various Chambers of Commerce. El Camino CACT maintains an assortment of brochures and marketing software to reach targeted customers and advise the business community of upcoming events and training opportunities. El Camino CACT also utilizes employer and employee evaluations to gauge training needs and maintain firm relationships with manufacturing and aerospace industry associations.

El Camino CACT is requesting an additional 8% of ETP funding in the proposed agreement for training support activities which include recruitment of participating employers and assessment of employer-specific job requirements.

Training Agency Certification

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. Most schools must also be licensed by the Bureau of Private Postsecondary Education (BPPE), created in statute effective January 1, 2010.

In keeping with the Panel's standards, El Camino CACT is eligible as a training agency based on the following:

- Accredited by the Accrediting Commission for Community and Junior Colleges (ACCJC), Western Association of Schools and Colleges.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by El Camino CACT under an active ETP Agreement with core program funding. [Note: There is also an active contract with alternative source funding (AB 118).]

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET14-0217	\$1,260,646	11/25/13 – 11/24/15	1,093	730	667

Based on ETP Systems, El Camino CACT reimbursable hours have been tracked for potential earnings of \$913,556 (73% of approved amount). The Contractor projects final earnings of 98% based on training currently committed to by employers and in progress through August 2015.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0125	Statewide	09/04/12 – 09/03/14	\$698,040	\$677,083 (97%)
ET12-0143	Statewide	10/03/11 – 10/02/13	\$749,037	\$715,868 (96%)
ET11-0204	Statewide	04/04/11 – 04/03/13	\$398,884	\$374,756 (94%)
ET09-0240	Statewide	10/20/08 – 10/19/10	\$847,467	\$846,942 (99%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Cerritos College, Norwalk - \$170,487

Antelope Valley College, Lancaster - \$28,287

Training vendors may provide any of the following based on the industry specific needs of the participating employer: Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, Management Skills, Manufacturing Skills, Literacy Skills.

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

24 – 200 (Job Number 1)

8 – 60 (Job Number 2)

Trainees may receive any of the following:

BUSINESS SKILLS

- + Business Grammar and Writing Skills
- + Business Fundamentals
- + Communication Skills
- + Conflict Resolution and Management
- + Cost Control
- + Customer Service
- + Finance for Non Finance People
- + Goal Setting
- + Managing Change
- + Negotiating
- + Performance Management Skills
- + Planning and Organization
- + Presentation
- + Project Management
- + Project Coordination
- + Time and Priority Management

COMPUTER SKILLS

- + Access
- + Adobe Acrobat 9 Professional
- + CAD Cam Engineering Software Training
- + Computer Skills for Production & Inventory
- + E-Commerce
- + Enterprise and Manufacturing Management Systems
- + Microsoft Office Advanced
- + Business Analytical Reporting & Presentation
- + QuickBooks and Accounting Software
- + Windows Advancement
- + SharePoint in Manufacturing Settings

CONTINUOUS IMPROVEMENT

- + Analyzing and Interpreting Data
- + Design of Experiments
- + 8D (Eight Disciplines) Problem Solving
- + Frontline Leadership
- + ISO (International Organization for Standardization)
- + Kaizen Methodolgy
- + Lean Manufacturing
- + Problem Solving
- + Process Improvement
- + Process Management
- + Quality
- + Root Cause Analysis

- + Set Up Time Reduction
- + Process Mapping
- + Six Sigma
- + Statistical Process Control (SPC)
- + Team Building
- + APICS

HAZARDOUS MATERIALS

- + Hazardous Waste
- + Hazardous Materials
- + Hazardous Chemical Cleaning
- + Hazardous Waste Cleaning
- + Hazardous Waste Operations and Emergency Response

OSHA 10/30 (Certified OSHA Instructor)

- + OSHA 10 (Requires Completion of 10 Hours)
- + OSHA 30 (Requires Completion of 30 Hours)

MANAGEMENT SKILLS (managers and supervisors only)

- + Leadership
- + Navigating Change
- + Supervisory Skills

MANUFACTURING SKILLS

- + Blueprint Reading
- + Electrical Fundamentals
- + Geometric Dimension and Tolerances
- + Industrial Maintenance
- + Manufacturing & Assembly
- + Numerical Control Functions
- + Pneumatics
- + Production Manufacturing & Operating Skills
- + Programmable Logic Controllers (PLCs)
- + Shop Measurements

LITERACY SKILLS*

- + Vocational English as a Second Language
- + Basic Workplace Terminology
- + Introduction of Process Terminology
- + Written Communications
- + Understanding Manuals and Reports
- + Basic Math
- + Locating Information on Charts and Graphs

*Literacy Skills training cannot exceed 45% of a trainee's total training hours

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Number 1 and 60 total training hours per trainee I Job Number 2, regardless of the method of delivery.

**Participating Employers for
Multiple Employer Contract (MEC) Retraining**

Contractor's Name: El Camino CACT

CCG No.: ET15-0427

Reference No: 15-0099

Page 1 of 4

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Alliance Space Systems

Address: 4398 Corporate Center Drive

City, State, Zip: Los Alamitos, CA 90720

Collective Bargaining Agreement(s): N/A

Estimated #of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: N/A

Total # of full-time company employees in California: 143

Company: Diamond Mattress

Address: 3112 E. Las Hermanas Street

City, State, Zip: Rancho Dominguez, CA 90221

Collective Bargaining Agreement(s): United Steel Workers (USW) Local 675

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

Total # of full-time company employees worldwide: N/A

Total # of full-time company employees in California: 93

Company: Econolite Group, Inc.

Address: 3360 E. La Palma

City, State, Zip: Anaheim, CA 92806

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 0

Total # of full-time company employees in California: 280

Company: F. Gaviña & Sons, Inc.

Address: 2700 Fruitland Ave.

City, State, Zip: Vernon, CA 90058

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: N/A

Total # of full-time company employees in California: 218

**Participating Employers for
Multiple Employer Contract (MEC) Retraining**

Contractor's Name: El Camino CACT

CCG No.: ET15-0427

Reference No: 15-0099

Page 2 of 4

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Golden State Engineering, Inc.

Address: 15338 S. Garfield Ave.

City, State, Zip: Paramount, CA 90723

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: N/A

Total # of full-time company employees in California: 204

Company: Hydraflow

Address: 1881 W. Malvern Ave.

City, State, Zip: Fullerton, CA 92833

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: N/A

Total # of full-time company employees in California: 240

Company: Kinkisharyo International, LLC

Address: 300 N. Continental Blvd., Suite 300

City, State, Zip: El Segundo, CA 90245

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 50

Total # of full-time company employees worldwide: 294

Total # of full-time company employees in California: 178

Company: LeFiell Manufacturing

Address: 13700 Firestone Blvd.

City, State, Zip: Santa Fe Springs, CA 90670

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: N/A

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

**Participating Employers for
Multiple Employer Contract (MEC) Retraining**

Contractor's Name: El Camino CACT

CCG No.: ET15-0427

Reference No: 15-0099

Page 3 of 4

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Marukan Vinegar (USA) Inc.

Address: 16203 Vermont Ave.

City, State, Zip: Paramount, CA 90723

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: N/A

Total # of full-time company employees in California: 30

Company: NS Corporation

Address: 235 W. Florence Ave.

City, State, Zip: Inglewood, CA 90301

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 89

Total # of full-time company employees in California: 87

Company: Pelican Products

Address: 23215 Early Street

City, State, Zip: Torrance, CA 90505

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 1,300

Total # of full-time company employees in California: 490

Company: Romac Supply Company

Address: 7400 Bandini Boulevard

City, State, Zip: Commerce, CA 90040

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 29

Total # of full-time company employees worldwide: 6

Total # of full-time company employees in California: 62

**Participating Employers for
Multiple Employer Contract (MEC) Retraining**

Contractor's Name: El Camino CACT

CCG No.: ET15-0427

Reference No: 15-0099

Page 4 of 4

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: TL Machines

Address: 14272 Commerce Drive

City, State, Zip: Garden Grove, CA 92843

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: N/A

Total # of full-time company employees in California: 140

Company: Weber Metals, Inc.

Address: 16706 Garfield Avenue

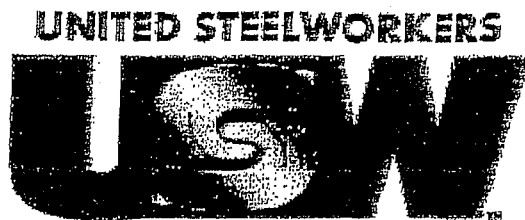
City, State, Zip: Paramount, CA 90723

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 90

Total # of full-time company employees worldwide: 5

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



UNITY AND STRENGTH FOR WORKERS

LOCAL 675

James Norris

President

David Campbell

Secretary-Treasurer

January 30th, 2015

To Employment Training Panel (ETP):

United Steel Workers is supportive of the Manufacturing Skills Technology Training Program supported through El Camino College in direct partnership with Cerritos College and Diamond Mattress to provide training to employees. We understand that this is a new and exciting program designed for Diamond Mattress employees to enhance their skills and grow in the work place. The training received under this program will assist Diamond Mattress to provide a continuous learning environment for its employees and acquire valuable skills to become more productive and efficient.

Sincerely,

Robert L. Cox

USW Local 675

Field Representative

United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers
International Union - USW Local 675

Phone 310-522-2277

1200 E. 220th street, Carson, CA 90745

fax 310-835-9324

DELEGATION ORDER



Training Proposal for:
5th Planet Games Inc.

Small Business \leq \$50,000

ET15-0414

Approval Date: April 6, 2015

ETP Regional Office: Sacramento

Analyst: M. Mazzone

CONTRACTOR

- Type of Industry: Technology/Other
 - Number of Full-Time Employees
 - California: 70
 - Worldwide: 70
 - Number to be trained: 42
 - Out-of-State Competition: NAICS Code Eligible
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 16%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☒ Yes ☐ No
- Owner ☒ Yes ☐ No

FUNDING

- Requested Amount: \$39,312
- In-Kind Contribution: \$45,528

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Management Skills	42	8-60 Weighted Avg: 36	0	\$936	\$15.07

- Reimbursement Rate: \$26 SB Priority
- County(ies): Placer
- Occupations to be Trained: Technology Developer, Production Staff, Product Game Designer, Creative Game Designer, Quality Assurance, Marketing Representative, Customer Service Representative, Manager, Owner
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Sierra Consulting Services in Cameron Park assisted with the development for a flat fee of \$3,770.
- Administrative Services: Sierra Consulting Services will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

Introduction

5th Planet Games Inc. (5th Planet), a software developer, was founded in 2009 in Rocklin. When 5th Planet opened there were only 4 employees and in less than 6 years the Company has expanded to a total of 70 employees. The Company develops content rich video games for mobile and web platforms. 5th Planet games can be played on iOS (Apple) and Android (Google) devices, and web platforms such as Armor Games, Facebook, Kongregate and Kabam. All applications are developed and monitored in-house by 5th Planet. The customer base of 5th Planet is comprised mainly of US-based mobile and web browser video game players; however, the Company's games can be purchased worldwide.

Need for Training

During the past year the video game industry has undergone significant technological changes. A new cross-platform game creation system called Unity has replaced the previously used Adobe Flash software. The cross-platform game creation system will allow 5th Planet to develop

applications for multiple operating systems simultaneously. Previously, 5th Planet would have to develop the software for iOS and Android separately.

Businesses within the video game industry will be using Unity to develop video games as the software is more advanced and works across platforms. To stay competitive and grow, 5th Planet must master the use of the Unity software platform for game creation. Staff will also receive training on Scrum, a software program that manages product development. With the use of Scrum, 5th Planet will be able to increase the speed to market for games development.

In addition, a formalized training plan has been developed to provide staff with the skills to improve customer service and efficiency. 5th Planet's training plan will include training in customer service, managerial, communication, and planning and execution skills.

Training Plan

Business Skills – Training will be provided to all occupations and will focus on improvement of organizational efficiencies, product development velocity, unit cohesiveness, and customer service. Training topics will include Business Communication, Customer Service, Planning and Organization, Project Management and Methodology, Communication Styles, and Time Management.

Computer Skills – Training will be provided to Tech Developers, Production Staff, Creative Game Designers, Product Game Designers, Quality Assurance and Managers. To remain competitive in the video game industry 5th Planet must train staff on new video game development and project management software. Training topics will include courses in Unity and Scrum software programs.

Continuous Improvement – Training will be provided to all occupations to improve product development and production velocity. Training topics will include Planning and Execution, and Project Management and Methodology.

Management Skills – Training will be provided to Owner and Managers to improve efficiencies, market competitiveness, and employee enthusiasm. Training topics will include Leadership, Motivation, Team Building, Coaching, Mentoring, and Change Management.

Modification

5th Planet is requesting a 2 year contract term due to an anticipated new game launch this year. High workloads are expected and the demands of the job may cause 5th Planet to be unable to complete the training within the standard 1 year term for Small Business. With an extended contract term, 5th Planet will be able to deliver all planned training.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- ❖ Business Communication Skills
- ❖ Communication Styles
- ❖ Customer Service Skills
- ❖ Customer Relationship Management Skills
- ❖ Planning and Organization
- ❖ Project Management Skills
- ❖ Project Requirements Analysis and Specifications
- ❖ Time Management

COMPUTER SKILLS

- ❖ Unity Software
- ❖ Scrum Software

CONTINUOUS IMPROVEMENT

- ❖ Planning and Execution
- ❖ Project Management and Methodology
- ❖ Leadership and Mentoring Skills

MANAGEMENT SKILLS (Management Only)

- ❖ Leadership Skills
- ❖ Motivation Skills
- ❖ Teambuilding Skills
- ❖ Coaching Skills
- ❖ Mentoring Skills
- ❖ Change Management

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER

Training Proposal for:
Alpha EMS Corporation
Agreement Number: ET15-0437

Panel Meeting of: April 14, 2015

ETP Regional Office: San Francisco Bay Area

Analyst: R. Boyd

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 152	U.S.: 152	Worldwide: 152
<u>Turnover Rate:</u>	19%		
<u>Managers/Supervisors:</u> (% of total trainees)	19%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$38,880		\$0	\$0		\$38,880

In-Kind Contribution:	100% of Total ETP Funding Required	\$48,523
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills Cont. Impr, Commercial Skills, Mfg Skills	36	8-200	0	\$1,080	\$16.66
				Weighted Avg: 60			

Minimum Wage by County: \$16.44 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	Wage Range	Estimated # of Trainees
Management Staff		7
Production & Test Staff		13
Engineering Staff		16

INTRODUCTION

In this proposal, Alpha EMS Corporation (AlphaEMS) (www.alphaemscorp.com) seeks funding for retraining as a priority industry high-tech manufacturer. Founded in 2003, AlphaEMS provides printed circuit board (PCB) prototyping and assembly production. AlphaEMS also offers a broad range of cross-functional computer components and services including design layout, material purchasing, assembly and warehousing. Customers are in the medical, high-tech industrial, military and mobile/wireless markets such as Fusion Space IO, Flextronics and San Francisco Circuit. Training will take place at the Company's facility in Fremont.

PROJECT DETAILS

Consumer demand is driving the miniaturization of computer parts to pack more power into smaller spaces and increase portability. New designs will require different materials to accommodate speed, performance, operating temperature and electrical requirements to enable more theoretical testing and problem solving for optimization.

AlphaEMS is expanding its training efforts. The Company will also be delivering certification training in quality assurance to qualify in-house trainers for ongoing training in this area.

Training Plan

Business Skills (20%): International Traffic in Arms Regulation (ITAR) training will be offered to all occupations so they will be able to both understand and comply with the requirements and procedures. Note that the Production & Test Staff and Engineering Staff will also be cross-trained in sales as they will be involved in negotiations. This will enable staff to effectively work to maintain margins.

Commercial Skills (20%): Engineering Staff will learn how to respond to commercial trends to develop small products such as cell phone parts and implantable medical devices. This demand is prompted by companies desiring to put more computing power and functionality into smaller goods.

Manufacturing Skills (20%): This training will be offered to Production and Test Staff in order to learn new processes developed as a result of design changes driven by miniaturization. Understanding new standard operating procedures in dealing with miniaturization will require additional training on processes and materials testing.

Continuous Improvement (40%): Training will be offered to all occupations. The ISO14001, AS9100 and ITAR certifications all require continuous training to be compliant with their respective governing bodies.

Impact/Outcome

This training is designed in part to meet requirements for key certifications, as needed to do business with a broader variety of industries:

- AS9100 (aerospace quality) certification enables AlphaEMS to do business with aerospace companies who require such certifications from their manufacturers.
- ISO14001 (international standards) certification allows AlphaEMS to respond to companies requiring environmental studies. It will also help the Company be environmentally conscious with waste disposal.
- ITAR (International Trafficking in Arms Regulation) certification is required for the manufacture of electronic components for any military application.

Commitment to Training

The training budget for AlphaEMS for 2014 was approximately \$50,000 and provided for new employee orientation, processes and procedures, basic quality management orientation, and electronic component monitoring. AlphaEMS represents that ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

An HR Administrator will oversee the training project and be responsible for managing the scheduling, delivery and documentation for Alpha EMS. They will also be meeting with ETP staff and working with a third party administrator, Assured Incentives Group (AIG). AlphaEMS will collect completed rosters and fax them to AIG for quality control and entry into ETP's online portal.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

AlphaEMS retained AIG in San Clemente to assist with development of this proposal for a flat fee of \$3,750.

ADMINISTRATIVE SERVICES

AlphaEMS also retained AIG to perform administrative services in connection with this proposal for a fee of \$4,650, not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Supply Chain Management
- International Traffic in Arms Regulation (ITAR) Compliance
- Job Costing & Labor Analysis
- Communication & Coaching
- Negotiations & Sales

CONTINUOUS IMPROVEMENT

- Inspection & Testing Procedures
- Supply Chain Management
- ISO 9001 & 14001 Guidelines & Implementation
- Internal Auditor Training

COMMERCIAL SKILLS

- Engineered Component Design Placement/Optimization

MANUFACTURING SKILLS

- Soldering & Materials Best Practices
- Printed Circuit Board Assembly Procedures
- Wave Soldering & Solder Reflow Process
- System Level Assembly Best Practices

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



**Retrainee - Job Creation
Training Proposal for:
Architectural Design & Signs, Inc.**

Small Business \leq \$50,000

ET15-0429

Approval Date: April 9, 2015

ETP Regional Office: San Diego

Analyst: S. Godin

CONTRACTOR

- Type of Industry: Manufacturing
Services
Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
California: 94
Worldwide: 109
Number to be trained: 84
Owner ☐ Yes ☒ No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 16%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$49,920
- In-Kind Contribution: \$25,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Mfg Skills, OSHA 10/30	74	8-60	0	\$520	\$15.07
				Weighted Avg: 20			
2	Retrainee Job Creation SB<100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Mfg Skills, OSHA 10/30	10	8-60	0	\$1,144	\$12.33
				Weighted Avg: 44			

- Reimbursement Rate: Job #'s 1 and 2: \$26 SB Priority
- County(ies): Riverside
- Occupations to be Trained: Administration/Operations Staff, Production Worker, Fabricator, Engineering/Design Staff, Installer, Sales Staff, Manager, Estimator
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #'s 1 and 2: \$1.54 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Formed in 1995 and located in Corona, Architectural Design & Signs, Inc. (AD/S) has evolved from a retail sign shop to a small business specializing in the design, fabrication, installation, and maintenance of signs, displays, and fixtures. Its signs range from large "neon art" in Las Vegas to directional signage found in airports, hospitals, universities, resorts, retail outlets, office parks, and stadiums. The Company's customers include McCarren International Airport, Wal Mart, Lowe's, Home Depot, LA Fitness, Nordstrom, and Wet Seal.

To effectively sustain and manage its growth, AD/S is developing standard procedures and implementing Lean Manufacturing, and these topics are part of the training plan.

The need for training is also being driven by the Company's recently purchased Customer Relation Management System software. Although the system went live in February 2015, only

the “super users” have received training. Those users will serve as in-house trainers for the rest of the AD/S workforce. Everyone from the production floor to the president will receive training in some aspect of the new software.

Retrainee – Job Creation

AD/S experienced a 38% revenue increase over the last 24 months; and its California employee count grew from 64 to 94, over the same time period. To support this upswing in production demands and growth, the Company moved from a 25,000 to 65,000 square foot building in January 2015. Based on this, AD/S has forecasted 25%-40% overall business growth over the next two years. To support the expansion of its existing business functions, AD/S has committed to hiring 10 full-time workers during the term of the proposed ETP Agreement (Job Number 2). The new employees will require extensive training to develop the requisite skills needed for growth.

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

Temporary to Permanent Employees

The Company estimates that 6 of the 10 trainees in Job Number 2 will fall under Panel guidelines for “temporary to permanent” employment. AD/S will retain these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training. These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired.

Training Plan

Business Skills - Training will be provided to all occupations in the areas of communication, customer relations, marketing, sales and business development, financial accounting principles, project management, goal setting and time management. These skill sets will give employees the skill sets to implement customer solutions and increase customer and employee satisfaction.

Commercial Skills - Training will be offered to all occupations as it relates to job function. Skill sets will be delivered in a myriad of topics such as product knowledge; design requirements; permit drawing procedures; lighting, digital display and signage installation; industry terminology and standards; design plans and layouts; project documentation and contract requirements. Competency in commercial skills topics will enable staff to market AD/S products and services with acumen as the Company continues to grow.

Computer Skills - Training in the computer software listed on the curriculum will be provided to all occupations. AD/S recently purchased a new CRM software system (Salesforce) which went live in January 2015 and will be used to support sales and customer account information. The system’s super users have been trained. They will function as in-house trainers for Administrative/Operations Staff, Sales Staff, and select Managers. Training in recent updates to the Company’s ERP system (Vista) will enable employees to continue to navigate the software; thus reducing errors and rework, improving inventory management, and meeting customer demands. If used to its fullest capacity, Vista has the ability to link operations across all departments which is vital to improving the efficiency and company-wide communication needed to support the Company’s growth.

Manufacturing Skills - Production Workers, Fabricators, and Installers will receive training in topics such as Good Manufacturing Practices, equipment operation, maintenance and troubleshooting, fabrication skills, welding skills, and painting techniques. These skill sets will provide workers with the skills needed to improve product quality and the Company's overall manufacturing processes.

Continuous Improvement - Training will be offered to all occupations as it relates to job function. Training in Lean concepts, Six Sigma, process improvement, and quality concepts will help workers standardize processes, control quality, and improve efficiencies. Team building and problem solving will lead to improved operations and promote enhanced interactions with both internal and external customers. Training will also empower employees to manage performance, think strategically, and set appropriate goals for themselves and the organization as the Company moves to a high performance workplace.

Certified Safety Training

OSHA 10/30 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.

Production Workers and Installers will receive OSHA 10. Production Workers, Installer, Managers and select lead workers from all occupations will receive OSHA 30 training.

Modifications - Term Length

Although AD/S is a small business, this project includes a Job Creation component. Furthermore, summer is the busiest season for AD/S as customers tend to upgrade signage and create new marketing displays in time for the holiday season. As such, little if any, training will take place from June through August. For these reasons, AD/S is requesting a 24-month term of contract. Staff concurs that this length of term is needed to enable the Company to balance training and production needs.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8 - 60

Trainees may receive any of the following:

BUSINESS SKILLS

Customer Care Skills

- Customer Retention
- Customer Engagement
- Customer Relationship Building

Advanced Sales & Marketing Skills

- Suspecting
- Sales Account Management
- Sales Forecasting
- Advanced Closing Techniques
- Sales Procedures & Strategies

Project Management

Finance/Accounting/Budgeting Principles

Communication Skills

Negotiation Skills

Conflict Management & Resolution

Goal Setting & Time Management Skills

AD/S People by Process (onboarding)

Coaching/Mentoring Skills

COMMERCIAL SKILLS

Bid Package Review Process

Creating and Understanding Design Plans & Layouts

Meeting Design Requirements

Permit Drawing Plans and Procedures

Lighting and Digital Displays Product Knowledge

Lighting/Signage Installation Procedures

Sign Industry Terminology and Variations

Sign Manufacturing Requirements

Installation Processes & Procedures

Understanding City Codes and Compliances

Understanding Contract Requirements

Project Documentation Requirements

COMPUTER SKILLS

Salesforce (CRM) Software

Vista (ERP) Software Updates

Corel Draw Software

Sketch-Up Software

Adobe Illustrator Software

Adobe Photoshop Software

Omega 5 Software (Fabricators)

Catmaster 3 Software (Fabricators)

Rosterlink Software (Fabricators)

Enroute4 Software (Fabricators)

CONTINUOUS IMPROVEMENT

Lean Manufacturing Skills
Process/Quality Improvement
Standard Operating Procedures
Strategic Planning
Decision Making/Problem Solving
Teambuilding
Leadership Skills
Kaizen Events
Six Sigma
5S
Scrap Reduction Techniques
Set-Up minimization

MANUFACTURING SKILLS

Equipment Operation, Maintenance & Troubleshooting
Good Manufacturing Practices (GMP)
Fabrication Skills
Painting Techniques
Crane Operating Training
Rigger Training
Boom and Scissor Lift Training
Swing Stage Training
Forklift Training
Welding Certification- Alum (D1.2)

CERTIFIED SAFETY TRAINING (OSHA Certified Trainer)

OSHA 10 (requires completion of 10 training hours)
OSHA 30 (requires completion of 30 training hours)

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

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER



AB118
Training Proposal for:
Atlas Disposal Industries, LLC

Small Business \leq \$50,000

ET15-0803

Approval Date: April 1, 2015

ETP Regional Office: Sacramento

Analyst: W. Sabah

CONTRACTOR

- Type of Industry: Green Technology Services
Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
California: 90
Worldwide: 90
Number to be trained: 9
Owner ☐ Yes ☒ No
- Out-of-State Competition: Other: N/A
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 10%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$9,360
- In-Kind Contribution: \$9,000

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	Commercial Skills	9	8-60	0	\$1,040	\$22.50
				Weighted Avg: 40			

- Reimbursement Rate: \$26 SB Priority
- County(ies): Sacramento
- Occupations to be Trained: Maintenance Technician, Fleet Manager
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Sierra Consulting Services in Cameron Park assisted with development for a flat fee of \$900.
- Administrative Services: Sierra Consulting Services will also provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: Natural Gas Vehicle Institute in Las Vegas, NV will provide Commercial Skills.

OVERVIEW

Founded in 1998, Atlas Disposal Industries, LLC (Atlas Disposal) (<http://atlasdisposal.com/>) is an independently owned waste management and recycling removal companies in the Sacramento region. The Company has a national profile as well, operating its own biofuel station and digester to recycle food waste into Renewable Natural Gas (Clean Natural Gas made from renewable sources) from food waste. Their customer base consists of restaurants, constructions sites, office buildings, and retail stores.

Training will assist Atlas Disposal to cleanly and efficiently power their vehicles and responsibly meet the energy and environmental needs to provide customers with green and more economical waste management and recycling options.

AB 118

The AB 118 Program is administered by ETP in partnership with the California Energy Commission (CEC). The overall goal of the AB 118 Program is to support a transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle

technologies. Training is focused on job skills for a skilled workforce for the production, maintenance, and distribution/sale of vehicles powered by new alternative fuels, as well as the design, construction, and operation of the accompanying refueling infrastructure for such vehicles.

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

The Need for AB 118 Training

Atlas Disposal's waste management and recycling removal services require the Company to stay up-to-date with the ever-changing industry demands for green technology. Customers also demand green vendors as the recycling and refuse industry is moving toward a cleaner, greener approach. In addition, Atlas Disposal wants to stay competitive in a market where many customers are looking for vendors with alternative fuel vehicles order to be awarded certain state contracts.

Atlas Disposal is currently in the process of converting its fleet from diesel to CNG vehicles. Out of 56 vehicles, the Company now has 22 CNG trucks and anticipates buying 3-4 more CNG vehicles by 2016. CNG engines and technology is constantly evolving and requires specialized maintenance training in comparison to diesel engines. The Company seeks to provide proficient and cost-effective service/maintenance to efficiently power their vehicles and responsibly meet the energy and environmental needs in the future. Due to the steep learning curve of CNG vehicle maintenance, Atlas Disposal will require extensive training on CNG engines.

Training will provide the Company with information to determine as to how much of the CNG engine breakdowns are due to technology and how much is due to the lack of expertise within the maintenance team. Training will increase CNG knowledge to dramatically reduce maintenance load and improve efficiency. In addition, the Company will be able to work with CNG fuel tank manufacturers to provide recommendations to improve future CNG engines.

Training Plan

Atlas Disposal will train in AB118 Commercial Skills spanning both maintenance and service skills. Class/Lab training will be provided by the only Automotive Service Excellence training vendor in the natural gas vehicle industry that meets the Company's training needs. Although the vendor is from out of state, all training will be delivered in California.

Commercial Skills - The curriculum encompasses a program of training in maintenance-services for CNG vehicles and fueling systems. Maintenance Technicians and Fleet Manager will receive training to increase CNG engine knowledge and improve maintenance efficiency to provide clean-green services. In addition, training will equip trainees with the skills to successfully pass the CNG Fuel System Inspector examination to receive certification.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8-60

Trainees may receive any of the following:

COMMERCIAL SKILLS

- ❖ CNG Fuel System Inspector Certification:
 - Properties and Characteristics of Natural Gas
 - CNG Cylinders 1-4, Construction Methods, Certification Requirements, Current and Past Manufacturers
 - Cylinder Failure
 - Codes and Regulations for CNG Cylinders and Other Fuel System Components
 - CNG High-Pressure Components, Purpose and Common Failure Modes
 - Identify and Assess NGV Cylinder and Fuel System Installation
 - Information Interpretation from a CNG Cylinder Label
 - Defueling Options for CNG Vehicles
 - Final Disposition Process for CNG Cylinders
 - Steps and Methods to Safely Perform a CNG Fuel System Inspection in Conformance with Established Standards

- ❖ CNG Fueling Station Operation and Maintenance Training:
 - Physical Properties of Natural Gas
 - Health Hazards of Natural Gas
 - Causes and Effects of Gas Quality in a CNG Fueling Station
 - Components of the CNG Fueling Station Operation & Maintenance
 - Critical Tools and Spare Parts to Maintain a CNG Fueling Station
 - Common Specifications Required in a Third-Party CNG Fueling Station Maintenance Contract
 - Necessities for an Emergency Fueling Plan
 - CNG Fueling Station Trouble Shooting Techniques
 - Usage of CNG Maintenance Logs
 - Major CNG Fueling Station Components and Maintenance
 - Federal Safety Regulations for CNG Fueling Stations
 - General Safety Issues Associated with CNG Fueling Stations and Risk Mitigation
 - Safety Procedures and Precautions to Maintain CNG Fueling Stations
 - Conducting CNG Fueling Facility Safety Evaluations
 - Procedures for Defueling CNG Powered Vehicles
 - Waste Tracking Requirements for CNG Fueling Stations and Hazardous Waste
 - Elements of a HAZOP Plan in Relation to CNG Fueling Stations

- ❖ Heavy Duty Natural Gas Vehicle Maintenance and Diagnostic Training:
 - Identify and Compare the Properties, Concerns and Safety Procedures of CNG and LNG Fuels
 - Identify Installation Requirements and Operation of All Low- and High-Pressure Components in an NGV
 - Construct High-Pressure Lines and Fittings Following Safe and Proper Procedures

- Identify Maintenance Components/Intervals/Procedures that are Unique to NGVs; Perform Basic Maintenance and Repair Procedures
- Identify the Components and Operation of the Cummins ISL G Engine, Fuel, Ignition and Exhaust Emissions Systems; Perform Basic Maintenance and Repair Procedures
- Diagnose Electrical Related Issues, Sensors and Solenoids using Wiring Diagrams, Service Information, DMMs and Scan Tools; Identify and Interpret Diagnostic Data
- Diagnose Hard Starting and/or Poor Driveability caused by the NGV Fuel System
- Identify Unique Components and Operation of an LNG and HPDI LNG Fuel Systems
- Increase the Technician's Knowledge and Preparation for Successful Completion of the ASE H1 Alternative Fuels Certification Exam

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

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER



**Retrainee – Job Creation
Training Proposal for:
Bennett Engineering Services Inc.**

Small Business \leq \$50,000

ET15-0410

Approval Date: April 7, 2015

ETP Regional Office: Sacramento

Analyst: K. Smiley

CONTRACTOR

- Type of Industry: Engineering
Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
California: 14
Worldwide: 14
Number to be trained: 20
Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 10%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: \$13,936
- In-Kind Contribution: \$15,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, Commercial Skills	14	8-60	0	\$728	\$15.07
				Weighted Avg: 28			
2	Retrainee Job Creation Initiative SB <100 Priority Rate	Business Skills, Computer Skills, Commercial Skills	6	8-60	0	\$624	\$12.33
				Weighted Avg: 24			

- Reimbursement Rate: Job #'s 1 and 2: \$26 SB Priority
- County(ies): Placer County
- Occupations to be Trained: Administration Support Staff, CAD Technicians, Engineers, Project Managers, Owners
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #1: \$1.07 per hour; Job #2: \$0.33 per hour

SUBCONTRACTORS

- Development Services: Sallyanne Monti Consulting of San Francisco assisted with development of this proposal for a flat fee of \$400.
- Administrative Services: Sallyanne Monti Consulting will also assist with administrative services for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Bennett Engineering Services, Inc.(Bennett Engineering), www.ben-en.com, founded in 2008 and located in Roseville, is a civil engineering company that provides engineering services for private and public agencies. Bennett Engineering specializes in the construction and maintenance of pipelines, pump stations, and roadways. The Company also provides site design, computer aided design, surveying, and permit acquisition services to its customer base.

Bennett Engineering is eligible for standard retraining under the Out-of-State Competition Provisions for companies meeting the definition of an industry deemed by the Panel as facing out-of-state competition.

Bennett Engineering seeks funding to upgrade incumbent workers' skill sets and train newly hired employees to meet changing customer and industry demands. The proposed training will enable Bennett Engineering to achieve greater efficiencies, improve business skills and enhance customer satisfaction. ETP-funded Training will also allow Bennett Engineering gain an advantage over their competition while fostering growth.

The Company is requesting a two-year term due to heavy volume of work during peak construction periods (summer and fall). Training will occur in smaller increments during peak time and ramp up during off peak periods to ensure clients receive quality and timely services.

The Company proposes to decrease the full-time employment retention requirement from 35 hours per week to 30 hours per week. According to the Bennett Engineering representative, they offer full company benefits at 30 hours per week for all staff, as expressed in their employee handbook. The handbook is not a contract of employment, but may be construed as such, indicating job security. Moreover, the only job classifications for which the reduced workweek is requested are highly-paid professional Engineers, working in an exempt capacity. As such, they must put in however many hours of work are needed to complete a project, regardless of how many hours are scheduled each week. ETP approved an amendment to add three engineers to their previous agreement (ET13-0109) at a 30-hour workweek, on grounds that Bennett could not recruit professional engineering staff in their locale, without the incentive of a reduced workweek. The engineering staff are all highly-paid salaried employees, with earnings that average \$35.00 per hour. According to Bennett Engineering, as a Small Business competing with larger firms in the relatively small geographic region surrounding Roseville, the 30-hour workweek is an incentive and recruiting tool. Although a 30-hour workweek is not customary for the industry or occupation, it is arguably necessary for recruiting highly-paid professional staff under these circumstances, within the meaning of Panel standards for a reduced workweek. (See T.22 CCR 4400(h)(5).)

Staff recommends approval of the 30-hour workweek on this basis, limited to the Engineers, but only in this instance based on an amendment approved for their previous agreement. This recommendation is not meant to set precedent for any future contracts with this employer, or others.

Need for Training

This will be Bennett Engineering's second ETP Agreement. Under their previous Agreement the Company focused on becoming SWAPP certified, which allowed the Company to branch out into new markets. They trained all occupations in SWIMMM (Scientific Modeling Software for Storm Water, Sanitary & River Systems) software, which upgraded the skill set of all employees. Administrative Support Staff received training in customer service, sales, and marketing to attract more clients and expand their consumer base.

Bennett Engineering is experiencing urgent demands to upgrade their engineering capabilities & related processes for design & development, system integration, regulation applicability and monitoring capabilities pertaining to pipelines, pump stations and roadways technologies in the market sectors of Sewer System Management, Water Monitoring, Roadway Design, and related Advisory Services. The changes are being driven by industry and customer demands. To more effectively win project bids and more efficiently design projects, Bennett Engineering must expand their use of Ajera Project Management Software company-wide. This software is currently installed and running in a limited capacity in select areas of the Company. In addition, the changing landscape of industry-wide contract law has created the need for additional risk management and indemnity training. The Company also purchased new Project Management and Design Software.

Retrainee - Job Creation

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

Bennett Engineering is experiencing an increased volume of projects in the Water Management and Roadway Design sectors of their business. This increase is coming from both the public and private sector as the need for more efficient Water Management Systems increases. This increased need is allowing Bennett Engineering to increase their business capacity into the Water Management Industry. Sewer and Water Management clients are experiencing an influx of readily available State & Federal funding as well, to upgrade their technology and processes. Bennett Engineering needs to add to their employee base to keep up with these advancements and remain competitive and compliant in this industry. Bennett Engineering has experienced a 3% increase in project volume in this sector, with an expected 2-3% additional growth over the next 12-36 months. In order to meet the demand for Sewer and Water Management projects, Bennett Engineering has committed to hiring six new employees as shown in Job Number 2 and include one Administration Support Staff, one CAD Technician, one Engineer, and three Managers. These will be considered net-new-jobs under the current Agreement.

Training Plan

Business Skills – Training will be offered to Administration Support Staff, CAD Technicians, Engineers, Project Mangers, and Owners to improve communication skills, increase proficiency and improve productivity. Training will include Contract Law, Risk Management and Technical Communication Skills, to mitigate liability risks within regulatory driven industries.

Computer Skills – Training will be offered to Administration Support Staff, CAD Technicians, Engineers, and Project Mangers to expand and enhance skill sets in the upgraded internal software system. Training will include topics such as MicroStation & InRoads which will enable employees to utilize computer applications to collect and analyze data, enhance project delivery, and manage projects efficiently.

Commercial Skills - Training will be offered to CAD Technicians, Engineers, and Project Mangers. Training topics will include Advisory Services, Engineering Capabilities & Regulatory Applications. Training will allow staff to manage the increase in bidding, development, construction and maintenance of projects for pipelines, pump stations, and roadways in the Sewer System Management and Water Monitoring industries.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0109	Roseville	7/26/12- 7/25/14	\$10,608	\$8,476 (80%)

RECOMMENDATION

Staff recommends approval of this proposal.

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Contract Law
- Risk Management
- Technical Communication Skills

COMMERCIAL SKILLS

- Advisory Services for Upgrades
- Engineering Capabilities & Processes Upgrades
- Regulatory Applicability for Upgrades

COMPUTER SKILLS

- Microsoft Office interface for Project Management & Reporting
- Project Management Software Upgrades, Ajera
- Design Software Training (CAD, Microstation, InRoads)

E-Learning Hours

8-60

BUSINESS SKILLS

- Contract Law
- Risk Management
- Technical Communication Skills

COMMERCIAL SKILLS

- Advisory Services for Upgrades
- Engineering Capabilities & Processes Upgrades
- Regulatory Applicability for Upgrades

COMPUTER SKILLS

- Microsoft Office interface for Project Management & Reporting
- Project Management Software Upgrades, Ajera
- Design Software Training (CAD, Microstation, InRoads)

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER



**Retrainee – Job Creation
Training Proposal for:
Elite Ambulance, Inc.**

Small Business \leq \$50,000

ET15-0416

Approval Date: April 2, 2015

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

CONTRACTOR

- Type of Industry: Healthcare Services
Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
California: 93
Worldwide: 93
Number to be trained: 79
Owner ☐ Yes ☒ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 7%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$49,998
- In-Kind Contribution: \$23,845

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	SB <100 SET/HUA Priority Rate	Business Skills, Computer Skills, Cont. Improvement, MS Didactic & Clinical Preceptor	76	8-60	0	\$624	\$11.98
				Weighted Avg: 24			
2	Job Creation Initiative SB <100 SET/HUA Priority Rate	Business Skills, Computer Skills, Cont. Improvement, MS Didactic & Clinical Preceptor	3	8-60	0	\$858	*\$9.98
				Weighted Avg: 33			

*It will be made a condition of contract that trainees in Job Number 2 will never be paid less than the statewide minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table.

- Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Emergency Medical Technician; Communication Center Staff; Office Support Staff
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #1 only: \$1.73 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Elite Ambulance, Inc. (Elite) (<http://elite-ems.net>) is a locally-owned corporation providing emergency and non-emergency medical transportation in Los Angeles and Orange Counties. The Company started as a Basic Life Support Service provider in Los Angeles in 2007 with one ambulance and a handful of employees. It has grown in size and region of coverage since then, obtaining licenses in Orange County in 2012 and Los Angeles County in 2013. Elite also provides exclusive service to Olympia Medical Center and Marina Del Rey Hospital. Currently, Elite responds to over 50,000 requests for service per year.

Training Plan

Elite now plans to further expand its services. At present, the Company is only classified as "first responder emergency services and transport." As such, the Company is not able to use lights and sirens. Elite is in the process of upgrading its classification to include 911 service

areas. Also, the Company plans to provide paramedic services, which requires a new skill set for its Emergency Medical Technician (EMT) staff.

Training is also needed in regulatory standards in the ambulance industry. The implementation of the Affordable Care Act requires employees to be trained in new approaches and methodologies in managing healthcare billing. Additionally, employers are requiring the use of electronic patient care reports.

Retrainee - Job Creation

Due to the expansion to include 911 service areas and steadily increasing business, Elite must hire more employees. For this proposal, Elite has committed to hiring three new employees (Job Number 2). These trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Elite represents that these trainees will be hired into “net new jobs” as a condition of contract. Trainees will be reimbursed at a higher rate for standard curriculum courses, and will be subject to a lower post-retention wage.

Business Skills (5%) – Training will be offered to all occupations. Training will focus on customer service and conflict resolution and will also include healthcare billing processes to align with Affordable Care Act policies and changes in Medicare/Medi-Cal.

Continuous Improvement (15%) - Training will be provided to all occupations. Training will improve skills consistent with the Company's Performance Improvement Plan.

Computer Skills (5%) – Training will be offered to all occupations in ePro software, the Company's scheduling and reporting computer system. EMTs will also receive training in electronic patient care reports

Medical Skills Training (75%)

The Panel has established a “blended” reimbursement rate for Medical Skills Training, recognizing the higher cost of delivery for the Clinical Preceptor model. For this project, 82 Emergency Medical Technicians (EMT) will participate in didactic and preceptor training in advanced level skills needed to handle critically ill patients. Training topics will include care of the stroke patient, cardiac response and procedures, Respiratory Assessment and Pre-Hospital care to name a few.

SET HUA Wage Modification

All trainees in Job Numbers 1 and 2 work in a High unemployment area, exceeding the state average by at least 25%. Elite's location in Los Angeles qualifies for HUA status under these standards.

➤ Wage Modification

For HUAs, the Panel may modify the ETP Minimum Wage by up to 25%. Elite is requesting the full 25% modification (from \$15.97 to \$11.98 for Job Number 1 and from \$13.31 to \$9.98 for Job Number 2). For trainees in Job Number 1, if the ETP Minimum Wage is modified, the post-retention wages must exceed the start-of-training wages. For Job Number 2 (Job Creation), there is no need to show a wage increase for trainees.

RECOMMENDATION

Staff recommends approval of this proposal with the wage modification.

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

8–60

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Ambulance Operation Skills
- Standard Operating Procedures
- Communication Skills
- Documentation Skills/Report Writing
- Conflict Resolution
- Call Center and Dispatch Protocols
- EMS Communication and Protocols
- Performance and Quality Improvement

BUSINESS SKILLS

- Customer Service
- Patient Privacy/HIPAA
- Conflict Resolution

COMPUTER SKILLS

- Electronic Patient Care Reports
- ePro Scheduling and Reporting Software

MEDICAL SKILLS DIDACTIC

- Basic Life Support
- Airborne Pathogens
- Bloodborne Pathogens
- Body Mechanics
- Care of Bariatric Patients
- Care of the Renal Patient
- Care of the Stroke Patient
- Chronic Obstructive Pulmonary Disease
- Cardiac Arrest Response and Procedures
- EKG and Cardiac Monitors
- Critical Care Transport for EMT's
- EMT Skills Training
- Equipment Operation Skills
- Patient Assessment and Prehospital Care
- Oxygen Administration
- Pain Management
- Pediatric Patient Assessment and Care
- Psychiatric Patient Care including Restraint Usage
- Respiratory Arrest
- Respiratory Assessment and Pre-Hospital Care
- Standards of Care

MEDICAL SKILLS CLINICAL WITH PRECEPTOR

- Geriatric Patient Care
- Pediatric Patient Care
- Patient Assessment and Pre-Hospital Care
- Renal Patient Care

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.

DELEGATION ORDER



**Retrainee – Job Creation
Training Proposal for:
Empire Transportation, Inc.
Agreement Number: ET15-0419**

Approval Date: April 14, 2015

ETP Regional Office: North Hollywood

Analyst: J. Romero

PROJECT PROFILE

Contract Attributes:	SET HUA Retrainee Job Creation Initiative	Industry Sector(s):	Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Los Angeles, Riverside	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No CA Teamsters Local 911 and Teamsters Union Local No. 63		
Number of Employees in:	CA: 350	U.S.: 350	Worldwide: 350
Turnover Rate:	8%		
Managers/Supervisors: (% of total trainees)	0%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$99,725		\$0	\$0		\$99,725

In-Kind Contribution:	100% of Total ETP Funding Required	\$102,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, HazMat, PL - Commercial Skills	135	8- 200	0	\$585	\$15.07
				Weighted Avg: 39			
2	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, HazMat, PL - Commercial Skills	30	8-200	0	\$585	\$11.30
				Weighted Avg: 39			
3	Retrainee Job Creation Initiative SET	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, HazMat, PL - Commercial Skills	5	8-200	0	\$640	\$12.33
				Weighted Avg: 32			

Minimum Wage by County: The Statewide Average wage for SET is \$27.40. However, SET/HUA Standard Wage is \$15.07 per hour for Riverside County in Job 1; SET/HUA Reduced Standard Wage is \$11.30 per hour for Riverside in Job 2. For Job Creation in Job 3: \$13.31 per hour for Los Angeles and \$12.33 for Riverside County.

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

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

Health benefits of up to \$3.25 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		6
Customer Service Staff		15
Driver		88
Manager/Supervisor		13
Mechanic		3
Technical Support Staff		10

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 2		
Administrative Staff		4
Customer Service Staff		5
Driver		12
Manager/Supervisor		2
Mechanic		2
Technical Support Staff		5

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 3		
Administrative Staff		1
Customer Service Staff		1
Driver		1
Mechanic		1
Technical Support Staff		1

INTRODUCTION

Founded in 1970, Empire Transportation, Inc. (Empire), (www.empiretransportation.com) provides quality transportation services in Southern California. The Company is headquartered in Bellflower (Los Angeles County) and operates a branch facility in Perris (Riverside County). Empire provides employer shuttles, non-emergency medical transport, demand responsive transportation, campus shuttles, municipal transits, special event and charter transportation. Their customer base includes Kaiser Permanente, Disneyland Resort, Southern California Edison, Los Angeles Dodgers Stadium and city government (local public entities).

The Company currently provides 150,000 “transfers” per month, meaning how often a passenger boards and exits one of their transportation modes. The Company expects to grow to 180,000 transfers per month in the next 24 months which requires training for their new and existing employees on routes, technology and customer service techniques. With this expectation, Empire plans to hire an additional 40 employees during this period. Training will be provided at the work sites in Bellflower and Perris.

The Company is eligible to be funded under the Special Employment Training provisions. Empire's Drivers, Mechanics and Technical Support Staff belong to Teamsters Local Number 63 and Teamsters Local Number 911 and have provided letters in support of the proposed ETP-funded training.

PROJECT DETAILS

Commitment to Training

Empire reserves an annual budget of \$20,000 for training which includes mandatory training, employee orientation, OSHA mandated training, sexual harassment prevention and first aid training. Empire represents, that ETP funds will not displace the Company's existing financial commitment to training. Empire represents that safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Empire is ready to start training upon approval. Training will be provided at Empire's facilities in Bellflower and Perris by a combination of in-house staff and trainers by outside vendors.

Frontline Worker

Empire uses several job classifications with Manager or Supervisor in the title. However, the Company has confirmed that these employees actively manage teams and projects, provide training, and spend more than 50% of their time performing frontline work. These individuals do not hire, fire, or make company policy. Therefore based on the nature and scope of their job duties, these trainees meet the Panel's definition of frontline workers. As frontline workers, these trainees qualify for SET funding and are not included in the percentage of managers and supervisors identified on Page 1 of this proposal.

Productive Laboratory

In a Productive Laboratory (PL) setting, trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum and with no more than one trainee per instructor. The instructor must be dedicated to training delivery during all hours of training, and special attendance rosters will be used to assist in monitoring.

Empire plans to provide a small portion of PL training in Commercial Skills, specifically machine/equipment operation and material and technical-tools handling. The Company is proposing to deliver up to 15 hours of PL training to Drivers. Training equipment will include mobile data management and vehicle tracking information. PL training will be conducted at a 1:1 trainer-to-trainee ratio.

Retrainee - Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Under the Retrainee-Job Creation program, training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage. In this case, the lower wage is \$12.33 per hour (equivalent to the New Hire wage for Riverside County).

In this proposal, Empire has committed to hiring five new employees, in Job Number 3. To be eligible for reimbursement under this Job Number, the trainees must be hired within the three-month period prior to Panel approval or during the term of contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

SET/HUA - Wage Modification

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, the trainees in Job Number 1 and Job Number 2, and most of the trainees in Job Number 3, work in Perris, which has unemployment exceeding the state average by at least 25%. As such, this location qualifies as a High Unemployment Area (HUA). The Panel may modify the SET wage requirement for training in an HUA, moving from the statewide wage which is \$27.40 per hour, to the ETP Minimum Wage which is \$15.07 for retraining in Riverside County. Empire is requesting this modification for the 135 trainees in Job Number 1.

In addition, the Panel may modify the wage requirement for training in an HUA to 25% below the ETP Minimum Wage, if post-retention wages exceed the state-of training wages. Empire is requesting this further modification for the 30 trainees in Job Number 2, bringing the wage to \$11.30 per hour. The Company is not asking for an HUA wage modification for the 5 trainees in Job Number 3, because they already qualify for the Job Creation incentive wage which is \$12.33 in Riverside and Los Angeles Counties.

Training Plan

With this ETP proposed training, it will allow Empire to establish a new training culture and implement a training program that will involve all employees. The training will help the Company to provide structured and formal training that will improve employee performance, customer service and sales.

➤ Training Infrastructure

Empire is ready to start training upon approval. They have qualified trainers to provide training and a training plan in place. In addition, Empire will have an administrative coordinator to track all class rosters who will work closely with National Training Company, Inc. (NTCI), the company retained to assist with development and administration of this ETP project.

Business Skills (25%): This training will be offered to Administrative Staff, Customer Service Staff, Drivers, Manager/Supervisors, Mechanics and Technical Support. Trainees will be given techniques to better meet customer expectations, resolving complaints, identify problems and propose solutions that will exceed customer expectations. Customer satisfaction will translate to increase in demand in company services.

Commercial Skills (15%): This training will be offered to Drivers, Managers/Supervisors, Mechanics and Technical Support Staff. Trainees will learn correct procedures in operating vehicles and using Compressed Natural Gas equipment. Skills acquired will reduce fueling errors and will result in a reduction in operating cost.

Computer Skills (25%): This training will be offered to Administrative Staff, Customer Service Staff, Drivers, Managers/Supervisors and Technical Support Staff. Trainees will have computerized access to track route and passenger information and will have more capability to respond and provide service using detailed information about travel time, destinations and route information for customers.

Continuous Improvement (15%): This training will be offered to Administrative Staff, Customer Service Staff, Managers/Supervisors, Mechanics and Technical Support Staff. Training will

focus on teambuilding, problem solving and resolution which will improve rider ratings in the transportation system.

Hazardous Materials (5%): This training will be offered to Drivers, Managers/Supervisors and Mechanics. Trainees will learn how to report and handle hazardous materials such as hazardous fuels which will decrease company liability and increase profits.

PL – Commercial Skills (15%): This training will be provided to Drivers. They will learn route management, Route Match software, mobile data management, vehicle tracking, communicating with dispatch, emergency response capabilities, and fueling systems. The skills gained from training will allow drivers to perform their responsibilities more efficiently, improve overall customer service and will decrease cost on vehicle operation.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Empire retained NTCI in Irvine to assist with development of this proposal for a flat fee of \$5,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Skills
- Business Writing
- Communication Skills
- Customer Focused Service
- Customer Service
- Dealing With Difficult People
- Designing Routes
- Meeting Customer Expectations
- Operating Procedures
- Peer Coaching
- Reducing Negativity in the Workplace
- Resolving Complaints
- Route Management
- Transit Asset Management

COMMERCIAL SKILLS

- Best Practices
- Commercial Vehicle Maintenance and Repair
- Fueling Compressed Natural Gas Equipment
- Equipment Operation
- Mobility Management

COMPUTER SKILLS

- Internal Computer Applications
- Microsoft Office (Intermediate and Advanced)
- Outlook (Intermediate and Advanced)
- Reservation Systems
- Tablets

CONTINUOUS IMPROVEMENT

- Critical Thinking Skills
- Leadership Skills
- Problem Solving and Resolution
- Standard Work
- Team Building Skills

HAZARDOUS MATERIAL SKILLS

- Hazard Communication
- Hazardous Materials
- Hazardous Waste
- HAZMAT Requirements
- Emergency Response Team Training
- HAZMAT Training

Productive Lab (1:1 Ratio)

0 -15

Trainees may receive any of the following:

PRODUCTIVE LAB – COMMERCIAL SKILLS

- Dispatch-Driver Communications
- Emergency Response Capabilities
- Fueling Equipment
- Mobile Data Management
- RouteMatch
- Route Management
- Vehicle Tracking

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

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

DELEGATION ORDER



**Amendment #2 Proposal for:
Integrated Media Technologies, Inc.
Agreement Number: ET14-0289**

Approval Date: March 27, 2015

Effective Date: March 27, 2015

ETP Regional Office: North Hollywood

Analyst: E. Fuzesi

CURRENT PROJECT PROFILE

Contract

Type: Priority/SB<100
Job Creation

Industry

Sector(s): Technology/IT

Counties

Served: Los Angeles

Repeat

Contractor: ☒ Yes ☐ No

Union(s): ☐ Yes ☒ No

Priority

Industry: ☒ Yes ☐ No

Current Contract Term: January 27, 2014 to
January 26, 2016

Substantial
Contribution:

☐ Yes ☒ No

CURRENT FUNDING

Current Funding
\$44,200

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$5,720	\$49,920

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	SB<100 Priority Rate Retrainee	Business Skills, Computer Skills, Cont. Impr.	30	8-150	0	\$1,196	\$16.04
				Weighted Avg: 46			
2	Job Creation SB<100 Priority Rate	Business Skills, Computer Skills, Cont. Impr.	4	8-150	0	\$3,510	\$13.37
				Weighted Avg: 135			

Minimum Wage by County: Job Number 1: \$16.04 per hour for Los Angeles County;

Job Number(Job Creation) 2: \$13.37 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

Up to \$2.20 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation	
Occupation Title	Wage Range
Project/Systems Engineer	
Sales Staff	
Administrative Staff	
Supervisor/Manager	
Owner	

INTRODUCTION

Integrated Media Technology, Inc. (www.imtglobalinc.com), (IMT) is a systems integration company providing scalable technology systems for business operations. IMT provides, maintains and operates technology systems such as media technology, high performance computing, storage, networking and systems architecture for its customers nationwide. Systems integration is an active and constantly evolving industry. Training is critical to support newly released products, as well as keep employee skills current with advancements and changes in the industry.

AMENDMENT DETAILS

ETP training is currently being provided for trainees and is progressing rapidly. Due to the nature of frequent changes in the IT industry, which include technical system updates, there is a constant need for training. Although actively training, IMT does not anticipate using all funds currently allocated in Job Number 1 (Retrainee). The current demand for training is in Job Number 2 (Job Creation).

To support these increased training needs, IMT is requesting to reduce the average training hours in Job Number 1 and move those remaining funds into Job Number 2. This will allow the Company to increase their performance and capture all training hours in Job Number 2.

Increase Agreement Amount

In addition to redistributing funds, IMT is also requesting to increase the Agreement amount from \$44,200 to \$49,920. The newly hired staff have required more training hours (an average of 135 hours), than originally planned. Currently, trainees in Job Number 2 are receiving between 70 to 150 hours of training. Amending the contract to increase the weighted average for Job Number 2 trainees from 50 to 135 will allow IMT to increase the total number of training hours in this job number. The additional \$5,720 increase will assist the Company's Job Creation efforts.

Upon approval, IMT will be able to capture more job creation training. Even though the training funds are nearly exhausted in this Agreement, IMT is continuing to train at the Company's expense. This Amendment will be effective on a prospective basis (upon approval) because it adds funding.

Retroactive Effective Date

The request for additional funding was received on November 25, 2014. The Contractor was warned that training hours in excess of the original funding would be "at risk" but staff also indicated that a retroactive effective date was feasible. In the intervening months, it has been clarified that, as a matter of ETP policy, Delegation Order amendments should be prospective parallel to the process for Panel amendments. Nevertheless, in this instance, based on a possible confusion in communications, staff recommends an effective date retroactive to November 25, 2014.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARY OF PRIOR MODS/AMDS

- Revision No 1: Increase the Range of Hours in both job numbers from 8-60 to 8-150.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET14-0289	\$44,200	1/27/14-1/26/16	35	TBD	TBD

To date, the ETP Contract Status report shows that 35 trainees have been enrolled; two trainees have reached the maximum number of training hours (150). According to the ETP Class/Lab Tracking System, 1,962 total training hours have been provided (\$51,012) which exceeds the current Agreement. IMT has potentially exhausted its current funding amount. The Contractor is aware it cannot earn more than the Contract amount.

DELEGATION ORDER



Training Proposal for:
Lomita Chamber of Commerce
Agreement Number: ET15-0426

Approval Date: April 10, 2015

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee SB <100 SET HUA	Industry Sector(s):	Manufacturing Transportation/Logistics Healthcare Services Wholesale Trade 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		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$88,320		\$6,100 8%		\$94,420

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr.	50	8-200	0	\$770	\$15.97
				Weighted Avg: 40			
2	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Continuous Impr.	30	8-60	0	\$1,112	\$15.97
				Weighted Avg: 40			
3	Retrainee SB<100	Business Skills, Computer Skills, Continuous Impr.	20	8-60	0	\$564	\$15.97
				Weighted Avg: 24			
4	SB<100 SET HUA Retrainee	Business Skills, Computer Skills, Continuous Impr.	20	8-60	0	\$564	\$11.98
				Weighted Avg: 24			

Minimum Wage by County:

Job Numbers 1, 2, and 3: \$15.97 per hour for Los Angeles County.

Job Number 4 (SET-HUA Wage): \$11.98 per hour for Los Angeles County.

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

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

Participating employers may use health benefits to meet the Post-Retention Wage. Health benefits will vary by participating employer.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		20
Machine Operator		25
Production Staff		40
Engineer Level 1		5
Engineer Level 2		5
Manager/Supervisor Level 1		5
Manager/Supervisor Level 2		5
Shop Lead		10
Small Business Owners		5

INTRODUCTION

Established in 1946 and located in Lomita, Lomita Chamber of Commerce (Lomita Chamber) (www.lomitacoc.com) is a non-profit voluntary membership organization, serving the local business community which is predominantly entrepreneurs and small businesses, with a mix of large corporations such as McDonalds, Taco Bell, Wells Fargo Bank, Albertson's Supermarket, and 99 Cents stores. Lomita Chamber's membership is comprised of approximately 5,000 businesses (of which 90% meet the ETP definition of small business). The owners of a small business will be eligible for training consistent with ETP standards.

The Lomita community is known for its affordable housing and central location in the South Bay Area of Los Angeles County. Over the years, Lomita Chamber has sponsored various events to promote the community and businesses. Through these events, with the support of city departments and community leaders, the Lomita area has become known for fostering business growth.

Lomita Chamber enables networking for its members through its affiliation with local service providers such as insurance agencies, credit unions, and business counseling. Lomita Chamber sees a greater need for making the existing businesses more competitive, not only in local community but also in surrounding cities or regions. To accomplish this goal, Lomita Chamber partners with Redondo Beach, Wilmington, Carson, Compton, Hermosa Beach, Lawndale, Hawthorne, Inglewood, City of Industry, El Segundo, Gardena, San Pedro and Palos Verdes through the South Bay Association of Chamber of Commerce (SBACC).

PROJECT DETAILS

Lomita Chamber is focused on helping its members bring innovative business practices and new technology to the workforce. The proposed training program will provide them with sufficient Computer and Business Skills as needed to successfully manage and grow their businesses. Training will be offered to employers throughout the South Bay Area. The majority of training (95%) will be conducted at participating employer locations while the remainder will be at Lomita Chamber.

Training Plan

Lomita Chamber's curriculum is designed to serve the needs of a diverse workforce by allowing each company to customize training. Employers that will be participating have expressed a need to improve social media training for marketing, technical skills, and continuous improvement in order to stay competitive and meet customer demands. Lomita Chamber anticipates the proposed training to begin during the first week of April 2015.

Business Skills (30%) – Training will be provided to all occupations to improve communication skills, customer relations, business writing skills and business problem solving.

Computer Skills (30%) – Training will be provided to all occupations to learn how to effectively use the Company's internal software applications to design, program, implement, and troubleshoot new computer software programs such as social media, accounting software, and Microsoft suite.

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

Impact/Outcome

Lomita Chamber anticipates to assist large and small companies to prepare for certification programs that are typically awarded based on training and internal improvement. These certifications often lead to new market opportunities, new customers, and increased sales, which will ultimately help companies grow and provide workforce stability.

Commitment to Training

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

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

SET

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

HUA

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

➤ **Wage Modification**

For trainees in Job Number 4, the Panel may modify the ETP Standard Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Lomita Chamber is asking for a wage modification to the HUA Minimum Wage of \$11.98 for these trainees. Job Number 4 post-retention wages must be higher than the start-of-training wages.

Marketing and Support Costs

Over the years, Lomita Chamber has established relationships with regional partners, community members, and collaborative networks of businesses. Lomita Chamber hosts monthly meetings and uses newsletters, websites, and email communication to promote business opportunities, procurement news, government-assisted programs, and various networking events. Lomita Chamber has four employees dedicated to marketing, recruiting, assessment, scheduling, and training; therefore, Lomita Chamber seeks full support cost of 8% to fund extensive marketing efforts to recruit additional participating employers and assessment activities of employers. Staff believes 8% support costs are justified in this proposal.

Substantial Contribution

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

Trainer Qualifications

Lomita Chamber reports that 50% of Business and Computer Skills training will be provided by in-house staff with training vendor, Custom Corporate Communications. In-house Staff are competent in the subject matter and have completed all classes required for the proficiency in each topic of training prior to delivery of training on that topic (see Training Vendor below). The other half will be delivered in-house by the participating employers.

Training Coordinator

Lomita Chamber has designated one staff member to be responsible for all administrative responsibilities, including recording and tracking training. Lomita Chamber will utilize a third party vendor with ETP experience to aid in this endeavor (see Administrative Services below).

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Lomita Chamber retained DLI & Associates LLC in San Juan Capistrano to assist with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

Lomita Chamber also retained DLI & Associates LLC to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Custom Corporate Communications of Redondo Beach has been retained to provide 50% of the training for a fee of \$50,000 in Business Skills, Computer Skills and Continuous Improvement.

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

8 - 200 (Job Number 1)

8 - 60 (Job Numbers 2, 3 & 4)

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Writing Skills
- Communication Skills
- Sales Skills
- Social Media Marketing
- Project Management
- Leadership Skills
- Finance
- Goal Setting
- Managing Change
- Performance Management Skills
- Problem Solving
- Team Building
- Time and Priority Management

COMPUTER SKILLS

- E-Commerce
- QuickBooks and Accounting Software
- Search Engine Optimization (SEO)
- Social Media Networking Training
- Microsoft Office Suite - Basic (Small Business)
- Microsoft Office Suite - Intermediate/Advanced (Large Employer)

CONTINUOUS IMPROVEMENT

- ISO Auditor Training
- Quality Engineering
- Six Sigma
- Statistical Process Control Team Building
- Lean Enterprise
- Lean Manufacturing
- Lean Office
- Kaizen 7S
- Process Improvement
- Process Mapping
- Problem Solving
- Root Cause Analysis
- Set Up Time Reduction

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

Note: Reimbursement for retraining is capped at 200 total hours per trainee for Job Number 1 and 60 total hours per trainee in Job Numbers 2, 3 & 4, regardless of method of delivery.

Participating Employers for Multiple Employer Contract (MEC) Retraining

Contractor's Name: Lomita Chamber of Commerce

CCG No.: ET15-0426

Reference No: 15-0208

Page 1 of 2

Company: American Chung Nam LLC

Address: 1163 Fairway Drive

City, State, Zip: City of Industry, CA 91786

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 300

Total # of full-time company employees in California: 150

Company: CAMBRIAN Homecare

Address: 5199 E. Pacific Coast Hwy.

City, State, Zip: Long Beach, CA 90804

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 39

Total # of full-time company employees in California: 39

Company: Kokusai Soko America

Address: 1521 Francisco Street, Unit A

City, State, Zip: Torrance, CA 90501

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 23

Total # of full-time company employees in California: 13

Company: Ledtronics

Address: 23105 Kashiwa Court

City, State, Zip: Torrance, CA 90505

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 109

Total # of full-time company employees in California: 109

**Participating Employers for
Multiple Employer Contract (MEC) Retraining**

Contractor's Name: Lomita Chamber of Commerce

CCG No.: ET15-0426

Reference No: 15-0208

Page 2 of 2

Company: STORM Manufacturing

Address: 23201 Normandie Ave.

City, State, Zip: Torrance, CA 90501

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 61

Total # of full-time company employees worldwide: 61

DELEGATION ORDER**Training Proposal for:****Mitchell International, Inc.****Agreement Number: ET15-0415****Approval Date:** March 27, 2015**ETP Regional Office:** San Diego**Analyst:** M. Ray**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Technology/IT Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego, Orange, San Francisco	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 1,100	U.S.: 1,300	Worldwide: 1,700
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	14%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$79,920		\$0	\$0		\$79,920

In-Kind Contribution:	100% of Total ETP Funding Required	\$122,153
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement	185	8 - 200	0 - 20	\$432	\$15.93
				Weighted Avg: 24			

Minimum Wage by County: \$15.93 per hour for San Diego County; \$16.02 per hour for Orange County; and \$16.44 per hour for San Francisco County

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

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to \$1.49 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Corporate Support		50
Customer Support		15
Engineer/Product Developer/Information Technology		25
Senior Engineer/Senior Product Developer/Senior Information Technology		50
Sales/Marketing		10
Senior Sales/Marketing		10
Manager/Supervisor		25

INTRODUCTION

Founded in 1946 and headquartered in San Diego, Mitchell International, Inc. (Mitchell) (www.mitchell.com) is a software service provider. The Company provides technology, connectivity and information solutions to property/casualty claims and collision repair industries. Services include claims management solutions; medical claims processing and workflow software; and workers compensation management software, which are built on Mitchell's Extended Enterprise Platform (Platform). The Platform's capabilities and modules provide connectivity between various participants including insurance carriers, bill processors, value-added providers, repair and care facilities, and end users.

This project will target training for workers in Mitchell's three California locations in San Diego, Irvine and San Francisco.

PROJECT DETAILS

This will be the second Agreement between Mitchell and ETP within the last five years. In its first project (ET13-0232 - training completed in September 2014), the Company provided its trainees with Computer and Continuous Improvement Skills training specifically in Lean/Agile methodologies to support the Company's new software inspired by Lean Manufacturing approaches. Training enabled the Company to keep current with the latest software and programming technology.

As a large provider for this industry of technology solutions across North America, Mitchell processes over 50 million transactions annually for over 300 insurance companies/claims payers and over 30,000 collision repair facilities. Customers demand a comprehensive and growing portfolio of products, services and solutions that will simplify and accelerate processes to enable them to efficiently and effectively settle claims and repair vehicles.

Mitchell is committed to investment in new product development and process improvement initiatives. The Company has designed and developed its latest generation proprietary product offering, Third Party Solution, for insurance claims processors. Expected to roll out at the end of 2015, this new product will introduce innovative features that serve to improve, automate and optimize third-party insurance claims. This will require Mitchell to provide extensive training to enable design, implement, sales and service of the new product.

In addition to new products, the Company has developed a set of integrated processes and analytical toolset to provide a consistent method to plan product development. This will enable Mitchell to plan strategic product development priorities. Mitchell also launched a new product portfolio process to align, prioritize and manage its product delivery.

The Company's need for training is also driven by its recent acquisition. In late 2013, a private equity firm acquired Mitchell and began implementing company-wide process improvements. The acquisition resulted in extensive organizational changes to ensure employees work efficiently between multiple systems.

Training Plan

Business Skills (30%) – Training will be offered to all job occupations. Course topics such as Business Acumen, Customer Service, Product Design and Time Management will improve the trainee's ability to provide exemplary customer service and better manage the overall business while implementing new products and processes.

Computer Skills (30%) – Training will be offered to all occupations as it relate to their job function. Training in Software Application/Development Skills as well as Computer Language Skills will improve skills necessary to successfully design, develop, implement, sell, or service products.

The Company also plans to use Computer-Based Training (CBT) as a delivery method. Computer Skills in CBT will allow self-paced reinforcement of Class/Lab training at a trainee's workstation.

Continuous Improvement (40%) – Training will be offered to all occupations. Course topics such as Agile/Project/Process Management, Leadership Development, Problem Solving/Troubleshooting, and Process Improvement/Innovation Skills training will allow trainees to work efficiently in the changing environment and have the necessary skills to perform their specific job function. Continuous Improvement Skills training is critical to improve the Company's overall efficiencies and productivity.

Commitment to Training

Mitchell represents that ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements. Its current annual training budget in California is approximately \$620,000 for 2015/2016. ETP training is designed for advanced job skills, which will allow Mitchell to implement new curriculum related to the new products and process improvements.

➤ Training Infrastructure

Mitchell plans to contract with an administrative subcontractor to assist with ETP project administration. In addition, the Company has designated an individual to oversee and manage the scheduling, delivery, and documentation of training for all California facilities. The person will meet with ETP staff and work with the Company's administrative subcontractor.

Impact/Outcome

A comprehensive training program has been developed to equip Mitchell's workers with the skills needed to achieve overall business goals. Through training, the Company will forge new customer relationships as well as strengthen existing client relationships by delivering effective multi-line solutions, industry-leading integrations, and superior customer support. Further, supplemental training will support the expanded product line to continue to lead the industry in providing the most advanced suite of enterprise-wide claims management solutions.

Temporary to Permanent Hiring

Some trainees come under Panel guidelines for "temporary to permanent" employment. Mitchell has retained these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. (Unemployment Insurance Code Section 10201(c).) However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by Mitchell. Until then, Mitchell will not receive progress payments.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0232	San Diego and Irvine	12/19/12 – 12/18/14	\$99,900	\$78,918 (79%)

DEVELOPMENT SERVICES

Training Funding Partners (TFP) in Fountain Valley assisted with development of this proposal for a flat fee of \$6,500.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Acumen
- Communication/Collaboration Skills
- Conflict Resolution
- Customer Service Skills
- Marketing/Sales
- Negotiation
- New/Updated Product Skills
- Product Design Skills
- Time Management
- Workers Compensation Product Solutions Training

COMPUTER SKILLS

- Software Application/Development Skills
- Computer Language Skills:
 - .Net/C#
 - J2EE
 - Enterprise Java Beans
 - MuleSoft ESB/ Sonic ESB
 - Service Oriented Architecture
 - Restful Web Services
 - XML Schema
 - Java Messaging Services
 - Language Integrated Query
 - WCF
 - NoSQL (Not Only SQL)
 - Amazon Web Services
 - Puppet
 - Chef
 - Selenium
 - Bamboo
 - Maven
 - Jenkins
 - Sonar
 - Docker
 - Categorical Abstract Machine Language

CONTINUOUS IMPROVEMENT

- Agile/Project/Process Management
- Goal Setting/Career Development
- Leadership Development Skills
- Problem Solving/Troubleshooting
- Process Improvement/Innovation Skills
- Project Management
- Teambuilding

CBT Hours

0-20

COMPUTER SKILLS

- Adobe:
 - ActionScript and Multimedia in Flash CS4 (2 hours)
 - ActionScript and Multimedia in Flash CS5 (2 hours)
 - Adding Links and Images in Dreamweaver CS4 (2 hours)
 - Adding Links and Images in Dreamweaver CS5 (2 hours)
 - Adobe Acrobat 9: Fundamentals (2 hours)
 - Adobe Air 3 for Flash CS5.5 Developers (1 hour)
 - Adobe Air for Flash CS4 Developers (1 hour)
 - Adobe Captivate 4 (1.5 hours)
 - Adobe Fireworks CS4: Fundamentals (2 hours)
 - Adobe InDesign CS4: Fundamentals (2 hours)
 - Adobe InDesign CS5: Fundamentals (2.5 hours)
 - Adobe Reader 9 (1.5 hours)
 - Adobe Reader X (1 hour)
 - Advanced Features of Adobe Acrobat 8 (2 hours)
 - Animation in Flash CS4 (2.5 hours)
 - Animation in Flash CS5 (2 hours)
 - Cascading Style Sheets in Dreamweaver CS4 (2.5 hours)
 - Cascading Style Sheets in Dreamweaver CS5 (2.5 hours)
 - Creating and Working with PDFs in Adobe Acrobat 8 (2.5 hours)
 - Creating Interactive Web Pages in Dreamweaver CS4 (2.5 hours)
 - Creating Interactive Web Pages in Dreamweaver CS5 (2.5 hours)
 - Creating Navigation and Publishing Movies in Flash CS4 (1.5 hours)
 - Creating Navigation and Publishing Movies in Flash CS5 (1.5 hours)
 - Drawing and Working with Images in Flash CS4 (2.5 hours)
 - Drawing and Working with Images in Flash CS5 (3 hours)
 - Dreamweaver CS4 Site Maintenance and Advanced Concepts (2 hours)
 - Editing and Reviewing in Adobe Acrobat 8 (1 hour)
 - Forms and Document Security in Adobe Acrobat 8 (1.5 hours)
 - Illustrator CS4: Beyond the Basics (2.5 hours)
 - Illustrator CS4: Getting Started (2.5 hours)
 - Introduction to Adobe Flash CS4 Professional (2 hours)
 - Introduction to Adobe Flash Professional CS5 (1.5 hours)
 - Photoshop CS4: Beyond the Basics (3 hours)
 - Photoshop CS4: Getting Started (2 hours)
 - Photoshop CS5: Beyond the Basics (3 hours)
 - Photoshop CS5: Getting Started (2 hours)
 - Reusing Content in Dreamweaver CS4 (2 hours)
 - Reusing Content in Dreamweaver CS5 (1.5 hours)
 - Setting up a Site and Adding Content in Dreamweaver CS4 (2.5 hours)
 - Setting up a Site and Adding Content in Dreamweaver CS5 (2.5 hours)
 - Tables, Accessibility and Standards in Dreamweaver CS4 (1.5 hours)
 - Tables, Accessibility and Standards in Dreamweaver CS5 (1.5 hours)
 - Using Adobe Reader 8 (2.5 hours)
 - Using Flash CS4 Libraries, Text and Components (3 hours)
 - Using Flash CS5 Libraries, Text and Components (3 hours)
 - Workflow and Adobe Integration in Flash CS4 (2 hours)

- Crystal Reports:
 - Getting Started with Crystal Reports 2011 (2.5 hours)
 - Managing Data and Distributing Reports with Crystal Reports XI (3 hours)
 - Reporting Basics with Crystal Reports XI (3 hours)
- Information Technology Security:
 - Introduction to Information Security (1 hour)
 - Using E-mail, the Internet, and Social Media Safely in a Corporate Environment (1 hour)
 - Using your Desktop Computer and Mobile Devices Safely (1 hour)
- Intermediate/Advanced Microsoft Office:
 - Access 2010 Macros and VBA (1 hour)
 - Accessing Exchange Remotely and Using Forms in Outlook 2010 (1 hour)
 - Adding Graphics to Presentations in PowerPoint 2007 (1.5 hours)
 - Adding Images to Presentations in PowerPoint 2010 (1 hour)
 - Adding Lists and Objects in Word 2013 (0.5 hour)
 - Adding Multimedia and Animations to Presentations in PowerPoint 2007 (1 hour)
 - Adding Tables of Contents, Footnotes, Hyperlinks and Bookmarks in Word 2010 (1 hour)
 - Adding Visuals, Themes, and Styles to Excel 2010 Workbooks (1 hour)
 - Adjusting Document Views and Customizing the Appearance of Word 2013 (1 hour)
 - Advanced Customization in Excel 2007 (2 hours)
 - Advanced Data Management in Access 2007 (3.5 hours)
 - Advanced Data Management in Excel 2007 (1.5 hours)
 - Advanced Data Manipulation Features in Word 2007 (1 hour)
 - Advanced Document Features in Word 2007 (1.5 hours)
 - Advanced Document Navigation and Document Reviews in Word 2007 (2.5 hours)
 - Advanced Formats and Layouts in Excel 2013 (1 hour)
 - Advanced Formatting in Excel 2007 (2 hours)
 - Advanced Formatting in Word 2007 (1.5 hours)
 - Advanced Formatting in Word 2013 (1 hour)
 - Advanced Formulas and Functions in Excel 2013 (1 hour)
 - Advanced Importing and Exporting with Access 2010 (1 hour)
 - Advanced Slide Shows Tools in PowerPoint 2013 (1 hour)
 - Advanced Table Customization in Word 2013 (1 hour)
 - Analyzing Data in Excel 2007 (3.5 hours)
 - Analyzing Data with What-if Analysis in Excel 2010 (1 hour)
 - Animations and Media in PowerPoint 2013 (1 hour)
 - Applying Basic Data Formatting in Excel 2010 (1 hour)
 - Attending a Microsoft Office 2007 Live Meeting (1 hour)
 - Automating Excel 2010 Tasks Using Macros (1 hour)
 - Basic Access 2007 Forms (2 hours)
 - Basic Access 2007 Tables (2.5 hours)
 - Business Contact Manager with Outlook 2007 (3 hours)
 - Collaborating and Sharing Presentations in PowerPoint 2010 (1 hour)
 - Collaboration and Customization with the Calendar, Contacts and Tasks in Outlook 2013 (1 hour)
 - Collaborative Features in Word 2007 (2 hours)

- Completing Searches, Printing Items and Working with RSS Feeds in Outlook 2007 (2 hours)
- Configuring Rules, Alerts and Junk E-mail Settings in Outlook 2007 (2 hours)
- Creating and Customizing Visual Elements in Excel 2013 (1 hour)
- Creating and Formatting Tables in Word 2010 (1 hour)
- Creating and Modifying Forms in Access 2013 (1 hour)
- Creating and Modifying Queries in Access 2013 (1 hour)
- Creating and Modifying Reports in Access 2013 (1 hour)
- Creating and Populating a Database in Access 2013 (1 hour)
- Creating Basic Tables in Access 2010 (1 hour)
- Creating Custom Slide Shows in PowerPoint 2007 (1 hour)
- Creating Presentations in PowerPoint 2013 (1 hour)
- Creating Visio 2007 Diagrams (2.5 hours)
- Creating Workbooks, Worksheets and Data in Excel 2013 (1 hour)
- Customizing Document Layout in Word 2013 (1 hour)
- Customizing Options and Views in Excel 2013 (1 hour)
- Customizing Outlook 2007 and Using the Journal (2 hours)
- Customizing Outlook 2010 and Managing Accounts (1 hour)
- Customizing the Behavior and Appearance of Word 2010 (1 hour)
- Customizing Visual Elements in Excel 2010 (1 hour)
- Data Files, Archiving and Send/Receive Groups in Outlook 2010 (1 hour)
- Data Manipulation and Simple Relationships in Access 2010 (1 hour)
- Data Search, Data Validation and Macros in Excel 2013 (1.5 hours)
- Data Security, Archiving and Working Offline in Outlook 2007 (3 hours)
- Database Administration in Access 2007 (3 hours)
- Distributing Presentations in PowerPoint 2007 (1 hour)
- Drawing and Inserting Graphics in Word 2010 (1 hour)
- Embedding Charts and Tables into Word 2010 (1 hour)
- Enhancing PowerPoint 2013 Presentations (1 hour)
- Excel 2007 Charts, Pictures, Themes and Styles (1.5 hours)
- Excel 2007 Formulas and Functions (2 hours)
- Exchanging Data with Excel 2007 (3 hours)
- Finalizing a PowerPoint 2013 Presentation (1 hour)
- Formatting Cells and Worksheets in Excel 2013 (1 hour)
- Formatting Data in Excel 2013 (1 hour)
- Formatting E-Mail and Configuring Message Options in Outlook 2010 (1 hour)
- Forms, Fields and Mail Merge in Word 2010 (1 hour)
- Getting Started with Access 2010 (1 hour)
- Getting Started with PowerPoint 2010 (1 hour)
- Hosting a Microsoft Office 2007 Live Meeting (1.5 hours)
- Implementing Security with Outlook 2010 (1 hour)
- Importing and Exporting Data and Data Presentation in Access 2007 (2 hours)
- Inserting and Formatting Graphics in Word 2013 (1 hour)
- Instant, Text and Unified Messaging in Outlook 2007 (1 hour)
- Introduction to Forms in Access 2010 (1 hour)
- Introduction to Queries in Access 2010 (1 hour)
- Introduction to Reports in Access 2010 (1 hour)
- Joins, SQL and Action Queries in Access 2010 (1 hour)
- Mail Automation, Cleanup and Storage in Outlook 2013 (1 hour)
- Management and Customization in Outlook 2013 (1 hour)
- Managing Attachments, Graphics, Signatures and Autoreplies in Outlook 2010 (1 hour)

- Managing E-Mail in Outlook 2013 (1 hour)
- Managing E-Mail with Rules, Automatic Replies and Alerts in Outlook 2010 (1 hour)
- Managing, Inspecting and Recovering Word 2010 Documents (1 hour)
- Manipulating Data in Excel 2013 (1 hour)
- Manipulating Formulas and Using Forms in Excel 2010 (1 hour)
- Manipulating Tables in Word 2010 (1 hour)
- Microsoft Access 2007 and Microsoft Publisher 2007 (1 hour)
- Microsoft Excel for Mac 2011: Navigating the Interface and Viewing Workbooks (1 hour)
- Microsoft Office 2007: Collaborating with Groove and Communicator (2.5 hours)
- Microsoft Office 2007: Sharing Information with OneNote 2007 (1 hour)
- Microsoft Office 2010: Getting Started with Lync (1 hour)
- Microsoft Office 2010: Lync Meetings, Calls, Sharing and Collaboration (1 hour)
- Microsoft Office 2010: Managing Information with OneNote (1 hour)
- Microsoft Office 2010: Sharing Information with OneNote (1 hour)
- Microsoft Office Excel, PowerPoint and Outlook 2007 (1.5 hours)
- Microsoft PowerPoint for Mac 2011: Animations and Presentation Tools (1 hour)
- Microsoft PowerPoint for Mac 2011: Using Media Files in a Presentation (1 hour)
- Microsoft Word for Mac 2011: Creating and Formatting Tables (1 hour)
- Microsoft Word for Mac 2011: Moving Around a Document (1 hour)
- Microsoft Word for Mac 2011: Structuring and Organizing Documents (1 hour)
- Modifying Basic Forms in Access 2010 (1 hour)
- Modifying Tables in Access 2013 (1 hour)
- Moving and Getting Around in Excel 2010 (1 hour)
- Moving Beyond E-Mail to Maximize Microsoft Outlook's Potential (1 hour)
- Moving Data and Modifying Worksheets in Excel 2010 (1 hour)
- Navigating and Reviewing Documents in Word 2013 (1 hour)
- New Features for End Users in Microsoft Office 2007 (1.5 hours)
- New Features for PowerPoint, Publisher and Access in Office 2010 (1 hour)
- New Messaging and Collaboration Features in Office 2010 (1 hour)
- Office 2010 New Core Features (1 hour)
- Office 2010 Web Apps and New Features in Publisher and Mobile (1 hour)
- Optimizing, Securing and Sharing Access 2010 Databases (1 hour)
- Organizing Data and Objects in Excel 2010 (1 hour)
- Outlook 2010 and Collaboration in Office 2010 (1 hour)
- Outlook 2010 Social Connector and Messaging (1 hour)
- Outlook Web Access 2007 Advanced Features (1 hour)
- Performing Calculations Using Functions in Excel 2013 (1 hour)
- PivotTable Filters, Calculations, and PowerPivot (1 hour)
- PivotTables and PivotCharts in Access 2010 (1 hour)
- PivotTables and PivotCharts in Excel 2010 (1 hour)
- Presenting Data in Tables and Charts in Excel 2013 (1 hour)
- Presenting Data using Conditional Formatting and Sparklines in Excel 2013 (1 hour)
- Programmability and Administration in Access 2007 (1.5 hours)
- Protecting and Sharing Excel 2007 Workbooks (2 hours)
- Queries and Reports in Access 2007 (2.5 hours)
- Reference Tools and Mail Merge in Word 2013 (1 hour)

- Retrieving, Validating, and Attaching Data in Access 2010 (1 hour)
- Reviewing and Protecting Content in Excel 2010 (1 hour)
- Reviewing and Protecting Content in Excel 2013 (1 hour)
- Saving and Printing Data in Excel 2013 (1 hour)
- Scheduling with Appointments, Events and Tasks in Outlook 2013 (1 hour)
- Sharing and Collaboration in Microsoft Office Enterprise 2007 (2 hours)
- Sharing and Collaboration in Word 2013 (1 hour)
- Sharing and Linking Data, and Adding Office Apps to Excel 2013 (0.5 hour)
- Sharing Excel 2010 Workbooks Online and on a Network (1 hour)
- Sharing, Printing, Protecting and Delivery Presentations In PowerPoint 2013 (1.5 hours)
- Structuring a Document in Word 2013 (1 hour)
- Subforms, Subreports and Conditional Formatting in Access 2010 (1 hour)
- The New Office 2010 Interface, Word 2010 and Excel 2010 (1 hour)
- Using Access 2010 with SharePoint and Access Services (1 hour)
- Using Advanced Slide Show Tools in PowerPoint 2010 (1 hour)
- Using Conditional Formatting, Tables, and Sparklines in Excel 2010 (1 hour)
- Using Excel 2010 Data Connections: Web Queries, XML and Databases (1 hour)
- Using Excel 2010 to Collaborate Online and with Other Office Applications (1 hour)
- Using Financial Functions and What-If Analysis in Excel 2013 (1 hour)
- Using Lookup, Reference, Math, and Text Functions in Excel 2010 (1 hour)
- Using Multimedia and Animations in PowerPoint 2010 (1 hour)
- Using Outlook Web Access 2007 (2 hours)
- Using PivotTables, PivotCharts and Advanced Charts in Excel 2013 (1 hour)
- Using Tables in Word 2013 (0.5 hour)
- Using Tables, Charts and Graphics in Word 2007 (2.5 hours)
- Using the Tasks, Notes and Journal Features in Outlook 2010 (1 hour)
- Using Themes, Backgrounds, Watermarks and Quick Parts in Word 2010 (1 hour)
- Verifying Excel 2010 Data and Formulas (1 hour)
- Visually Enhancing PowerPoint 2010 Presentations (1 hour)
- Workbook Settings, Conditional Formatting and Number Formats in Excel 2010 (1 hour)
- Working with Contacts in Outlook 2010 (1 hour)
- Working with Contacts in Outlook 2013 (1 hour)
- Working with E-mail in Outlook 2013 (1 hour)
- Working with Files and Folders and Using Search and RSS Feeds in Outlook 2010 (1 hour)
- Working with Meetings in Outlook 2013 (1 hour)
- Working with SharePoint, Calendars and Forms in Outlook 2007 (2.5 hours)
- Lotus Notes
 - Managing Mail, Instant Messaging and Contacts in Lotus Notes 7 (2.75 hours)
 - Using Lotus Notes 7 Remotely (1.5 hours)
 - Using Productivity Tools and Accessing Lotus Notes 8 Remotely (3 hours)
 - Working with Databases, the Calendar, and the To Do List in Lotus Notes 7 (3 hours)
- Microsoft Project
 - Advanced Customization with MS Project 2007 (2 hours)

- Advanced Customizing with Project 2010 (1 hour)
- Advanced Reporting and Management Tools in Project 2010 (1 hour)
- Advanced Resource Management with Project 2010 (1 hour)
- Advanced Scheduling Management with Project 2010 (1 hour)
- Advanced Tools for Managing Multiple Projects with Project 2010 (1 hour)
- Building a Schedule with Project 2010 (1 hour)
- Communicate and Finalize Project Information Using Project 2013 (1 hour)
- Communicating Project Information with Project 2010 (1 hour)
- Creating and Designing a Project with Project 2007 (3.5 hours)
- Creating Resources in Project 2010 (1 hour)
- Defining Project Properties in Project 2010 (1 hour)
- Initializing a Project with Project 2010 (1 hour)
- Introduction to Project 2010 (1 hour)
- Introduction to Project Management using Project 2010 (1 hour)
- Managing Resource Assignments with Project 2010 (1 hour)
- Monitoring Schedule Performance with Project 2010 (1 hour)
- Project Data Management and Performance with MS Project 2007 (3.5 hours)
- Resource Management in Project 2013 (0.5 hour)
- Setting-Up a Project in Project 2013 (1 hour)
- Specifying and Assigning Resources in Project 2007 (2.5 hours)
- Task-Based Scheduling in Project 2013 (1 hour)
- TestPrep 70-178 Microsoft Project 2010, Managing Projects (2.75 hours)
- Tools for Tracking Project Performance in Project 2013 (1 hour)
- Tracking and Reporting Progress with Project 2007 (3 hours)
- Creating Customized Publications with Publisher 2007 (3 hours)
- Extending Publisher 2007 Beyond Publications (2 hours)
- Systems, Applications, & Products (SAP):
 - Financial Accounting with SAP (2.5 hours)
 - SAP Administration (2 hours)
 - SAP Business One - Introduction for End Users (2 hours)
 - SAP BusinessObjects: Business Intelligence (1 hour)
 - SAP BusinessObjects: Crystal Reports (1.5 hours)
 - SAP BusinessObjects: Dashboards and Analytics (1 hour)
 - SAP BusinessObjects: InfoView (1.5 hours)
 - SAP BusinessObjects: Overview (1.5 hours)
 - SAP BusinessObjects: Web Intelligence (1.5 hours)
 - SAP Customer Relationship Management (CRM) (2 hours)
 - SAP Enterprise Resource Planning (ERP) (2.5 hours)
 - SAP ERP Architecture (1.5 hours)
 - SAP Logistics Modules (3 hours)
 - SAP NetWeaver Platform (2 hours)
 - SAP Product Lifecycle Management (2 hours)
 - SAP Project Planning and Implementation (2 hours)
 - SAP Supplier Relationship Management (1.5 hours)
 - SAP Supply Chain Management (2 hours)
 - Community Sites, Search, and Office Integration in SharePoint 2013 (1 hour)
 - Configuring Lists, Libraries, E-Mail, and Announcements in SharePoint 2013 (1 hour)
 - Configuring Pages, Sites, and Content in SharePoint 2013 (1 hour)
 - Creating and Managing Personal Sites and Searches in SharePoint 2007 (2.5 hours)

- SharePoint:
 - Getting Started with SharePoint 2010 (1 hour)
 - Managing SharePoint 2010 Pages and Components (1 hour)
 - Managing SharePoint 2010 Sites, Lists, and Libraries (1 hour)
 - Managing Templates, Views, and Versioning in SharePoint 2013 (1 hour)
 - Managing Web Parts, Users, and Groups in SharePoint 2013 (1 hour)
 - Microsoft SharePoint 2010: New Features for Power Users (1 hour)
 - My Site and Social Features in SharePoint 2013 (1 hour)
 - Navigating, Lists, Libraries, Alerts and Document Sets in SharePoint 2013 (1 hour)
 - SharePoint 2007 Essentials (3 hours)
 - SharePoint 2010 New Features for End Users (1 hour)
 - SharePoint 2010 Security and Business Intelligence (1 hour)
 - Using and Configuring Search in SharePoint 2013 (1 hour)
 - Using SharePoint 2010 with Office 2010 (1 hour)
 - Workflows, Collaboration and Analysis in SharePoint 2013 (1 hour)
- Visio:
 - Collaborating and Using Visio 2007 With Other Programs (1.5 hours)
 - Collaboration, Evaluation and Printing in Visio 2010 (1 hour)
 - Enhancing and Customizing Diagrams in Visio 2007 (3.5 hours)
 - Getting Started with Visio 2010 (1 hour)
 - Working with Diagrams in Visio 2010 (1 hour)
- Windows:
 - Customizing Windows 7 (1 hour)
 - Files and Connectivity in Windows 8 (1 hour)
 - Getting Started with Microsoft Windows XP (4.5 hours)
 - Getting Started with Windows 7 (1.5 hours)
 - Internet Explorer 10, File Sharing, and Recovery in Windows 8 (1 hour)
 - Introducing Windows XP (1.25 hours)
 - Managing Hardware and Advanced Options in Windows 8 (1 hour)
 - Microsoft Windows 7: First Look for End Users (2 hours)
 - Personalizing Windows 8 (1 hour)
 - Setting-Up and Securing Windows 7 (2 hours)
 - Up and Running with Microsoft Windows XP (4 hours)
 - Windows 8: New Features and Common Tasks (1 hour)
 - Windows XP: Advanced (4.5 hours)
 - Windows XP: Fundamentals (3.5 hours)
 - Working with Apps in Windows 8 (1 hour)

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

DELEGATION ORDER



Amendment #3 Proposal for:
Pacific Sintered Metals, A Division of PSM Industries, Inc.
Agreement Number: ET13-0405

Approval Date: April 7, 2015

Effective Date: Upon Approval

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

CURRENT PROJECT PROFILE

Contract Type:	Priority/SB<100 HUA - Retrainee	Industry Sector(s):	Manufacturing
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	June 30, 2013 to June 29, 2015	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$43,680

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$6,240	\$49,920

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
2	Priority/SB<100 HUA Job Creation	Business Skills; Computer Skills; Cont. Imp.; Mfg. Skills	10	8-80	0	\$1,144	*\$10.01
				Weighted Avg: 44			

*It is a condition of the current Agreement that the trainees in this Job Number will never be paid less than the statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

Minimum Wage by County: Job Number 2 (Job Creation/HUA): \$10.01 per hour in Los Angeles County

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

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

Up to \$1.51 per hour may be used to meet the Post-Retention Wage

INTRODUCTION

Pacific Sintered Metals, a Division of PSM Industries, Inc. (PSM) is a manufacturer of metal components for the aerospace, automotive, sports, and communications industries. PSM specializes in powder metallurgy fabrication, which the Company uses to produce complex precision parts with high durability.

PSM is facing growing pressure in the areas of productivity, quality, and costs. In response to these industry challenges, the Company has made a commitment to improve the skills of its employees through Lean Manufacturing and related continuous improvement principles. In addition, the Company hired new employees to help expand existing business capacity and keep pace with rising customer demand.

AMENDMENT DETAILS

PSM is requesting additional hours of training for the newly hired trainees in Job Number 2. This would increase the weighted average hours per trainee from 20 to 44, and increase the Average Cost per Trainee by \$624 (from \$520 to \$1,144). Overall, the Agreement amount would increase by \$6,240 (from \$43,680 to \$49,920).

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARIZE PRIOR MODIFICATIONS

- Revision 1: Revised the contract term end date by six months (18-month contract)
- Revision 2: Increased the Range of Hours from 8-60 to 8-80 and extended the contract term by another six months (24-month contract)

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET13-0405	\$43,680	06/30/13 – 06/29/15	107	0	0

Based on the ETP Online Tracking System, PSM has provided 100% of the total training hours.



Training Proposal for:
Perkins Inc. dba African American Expressions

Small Business \leq \$50,000

ET15-0425

Approval Date: April 2, 2015

ETP Regional Office: Sacramento

Analyst: M. Jones

CONTRACTOR

- Type of Industry: Wholesale Trade
- Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees
 - California: 15
 - Worldwide: 15
 - Number to be trained: 8
- Owner ☒ Yes ☐ No
- Customers Outside CA
- Out-of-State Competition:
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 15%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$9,680
- In-Kind Contribution: \$10,077

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB<100	Business Skills, Computer Skills, Continuous Improvement, Management Skills	8	8 - 60	0 - 14	\$1,210	\$15.75
				Weighted Avg: 55			

- Reimbursement Rate: \$22 SB Non-Priority
- County(ies): Sacramento
- Occupations to be Trained: Sales Staff, Customer Service Staff, Designer, Owners, Managers
- Union Representation: ☐ Yes
☒ No
- Health Benefits: \$0.35 per hour

SUBCONTRACTORS

- Development Services: Sierra Consulting Services of Cameron Park assisted with development for a flat fee of \$900.
- Administrative Services: Sierra Consulting Services will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1991 in Sacramento, Perkins Inc. dba African American Expressions (Perkins) (<http://www.black-cards.com>) is the largest African American owned greeting card company in America. The Company sells 2.5 million cards annually with over 250 original designs. Perkins has expanded to include many other products such as calendars, journals, address books, magnets, luxury tote bags and handcrafted figurines. Their primary customers are large Christian retail chains, hospital gift shops and large retail shops.

Need For Training

Perkins recently purchased the Enterprise 21 (ERP) software program. This system is a fully-integrated, end-to-end ERP application for small and mid-market manufacturing and distribution organizations. It is designed to facilitate industry best practices which include comprehensive software functionality to manage a complete business.

To help reduce shipping costs Perkins plans to train in inventory and sales order management. Implementing these new practices will help cut cost on re-picking and re-shipping. Staff will receive cross-training on procedures involving tax rates, import duties, trucking company procedures as well as overseas purchasing and flow of materials. To develop the Sales Staff, Perkins plans to provide training in social media marketing skills.

Perkins will also focus training on improving customer service skills, effective communication and problem solving skills.

Training Plan

Perkins will provide between 8 – 60 hours of Class/Lab and up to 14 hours in Computer-Based Training (CBT) in the following:

Business Skills – Training will be offered to all occupations to build skills in new efficiencies, communication, customer needs and Leadership skills. Training topics will include courses such as Business Communication, Conflict Resolution, Customer Relationship Management and Time Management.

Computer Skills – Training will be offered to all occupations in the new ERP/CRM and shipping software. Training topics will include courses Enterprise 21 ERP/CRM software, Starship Shipping software, Crystal Reports, and SQL Server (Management Studio).

Continuous Improvement – Training will be provided to all occupations to improve quality systems, complaint management systems, corrective and preventative actions. Frontline workers will learn techniques to reduce costs, work in teams and problem resolution. Training topics will include courses such as Process Improvement, Problem Solving, Team Building, and Meeting Management.

CBT-Computer Skills – Training will be provided to the Designer in new techniques. Training topics will include Photoshop for Designers: Filters, Working with Illustrations and Textures.

Management Skills - Training will be offered to Owners and Managers to improve Leadership skills. Training topics will include courses Leadership/Coaching, How to Coach and Mentor and Essential Skills for the New Supervisor.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8 - 60

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Communication
- Business Writing
- Conflict Resolution
- Creative Marketing
- Communication Skills
- Customer Relationship Management
- Customer Service
- Dealing With Difficult People
- Marketing/Sales Techniques
- Retaining Customers
- Time Management

COMPUTER SKILLS

- Enterprise 21 ERP/CRM Software
- Starship Shipping Software
- Crystal Reports
- SQL Server (Management Studio)

CONTINUOUS IMPROVEMENT

- Cross-Training
- Import/Export Processes
- How to Coach and Mentor
- Meeting Management
- Process Improvement
- Problem Solving
- Team Building

MANAGEMENT SKILLS (Owners/Managers Only)

- Essential Skills for the New Supervisor
- How to Coach and Mentor
- Leadership/Coaching

CBT Hours

0 -14

COMPUTER SKILLS

- Photoshop for Designers: Filters (5 hrs. 45 mins.)
- Photoshop for Designers: Working with Illustration (3 hrs. 15 mins.)
- Photoshop for Designers: Textures (4 hrs. 45 mins.)

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per-trainee.
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DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
Quincy Engineering, Incorporated**

Small Business \leq \$50,000

ET15-0422

Approval Date: April 9, 2015

ETP Regional Office: Sacramento

Analyst: M. Mazzone

CONTRACTOR

- Type of Industry: Engineering
 - Number of Full-Time Employees
 - California: 58
 - Worldwide: 68
 - Number to be trained: 56
 - Out-of-State Competition: NAICS Code Eligible
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 5%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☒ Yes ☐ No
- Owner ☐ Yes ☒ No

FUNDING

- Requested Amount: \$49,504
- In-Kind Contribution: \$88,102

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	51	8-60	0	\$884	\$19.21
				Weighted Avg: 34			
2	Retrainee Job Creation Initiative Priority Rate SB<100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	5	8-60	0	\$884	\$13.70
				Weighted Avg: 34			

- Reimbursement Rate: Job #'s 1 and 2: \$26 SB Priority
- County(ies): Alameda, Contra Costa, Placer, Sacramento
- Occupations to be Trained: Engineering Technician, Assistant Engineer, Associate Engineer, Senior Engineer, Project Manager, Computer Aided Drafter, Surveyor, Environmental Planner, Marketing Coordinator, IT Technician, Administrative Staff, Accountant, Senior Project Manager
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Sierra Consulting Services in Cameron Park will assist with the development of this proposal for a flat fee of \$4,700.
- Administrative Services: Sierra Consulting Services will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

INTRODUCTION

Quincy Engineering, Incorporated (Quincy Engineering) founded in 1992, is a civil engineering company headquartered in Rancho Cordova. The Company specializes in roadway design, bridge design, surveying, and construction management. Quincy Engineering's customer base is comprised of public agencies located in California, Oregon and throughout the Western United States. The agencies include cities, counties, and state departments of transportation and planning.

Quincy Engineering has a total of five locations, one of which is in Oregon. The other four are in California: Rancho Cordova, Roseville, Pleasanton, and Walnut Creek. All of the California locations will participate.

Need for Training

Quincy Engineering's growth plan is focused on market expansion for its existing base in the public sector and into the private sector. Currently, the Company's projects are only at the state or local level; the plan for expansion will reach the national level. Staff will require training in marketing, sales, and customer service skills in order to secure and service these new customers.

Job Creation

Quincy Engineering is currently experiencing a shortage of talent and has had to turn down projects due to the lack of qualified engineers. To meet current need and also to realize their goal of expansion, Quincy Engineering has committed to hiring at least five full-time permanent employees. The new hires will be recent college graduates, as recruited throughout California depending on each location's needs.

The Panel offers incentives to companies that commit to hiring new employees. Trainees are subject to a lower post-retention wage, and employers receive a high reimbursement rate. The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company represents that these trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Trainees will receive between 8–60 hours of classroom and/or videoconference training. Video Conference training will consist of classroom training being conducted at Quincy Engineering's headquarters in Rancho Cordova with trainees from the Roseville, Pleasanton, and Walnut Creek locations participating in the training via video monitors.

Business Skills – Training will be delivered to all occupations and will focus on the development of necessary skills to secure and properly service existing and new customers. Training topics will include courses: Customer Service Skills, Customer Retention, Marketing Skills, Sales Skills, Presentation Skills, Technical Writing, Technical Specification Preparation, and Time Management Skills.

Commercial Skills – Training will be delivered to Assistant Engineers, Associate Engineers, Senior Engineers, Project Managers, Senior Project Managers, Surveyors, and Environmental Planners. Trainees will receive job specific technical training to expand their current capabilities, which will allow Quincy Engineering to expand their services and better serve customers. Training topics will include: Roadway and Highway Design, Project Management, Environmental Studies, Confined Workspace, Sewage Treatment Systems, Water Conveyance Systems, and Technical Specifications.

Computer Skills – Training will be delivered to Engineering Technicians, Assistant Engineers, Associate Engineers, Computer Aided Drafters, Surveyors, Accountants, and IT Technicians. Computer training will ensure that staff is proficient in all engineering software versions and that IT staff is proficient in server maintenance. Training topics will include courses such as AutoCad 3D, Microsoft Server 2012, Sonicwall Hardware/ Firmware, and Sharepoint 2013.

Continuous Improvement – Training will be delivered to all occupations to improve efficiencies in the workplace. To improve process efficiencies, Quincy Engineering will focus training on the course topic Organization and Planning.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- ❖ Customer Service Skills
- ❖ Marketing Skills
- ❖ Sales Skills
- ❖ Public Speaking Skills
- ❖ Time Management Skills
- ❖ Technical Writing
- ❖ Technical Specification Preparation

COMMERCIAL SKILLS

- ❖ Roadway and Highway Design
- ❖ Project Management
- ❖ Environmental Studies & Documentation Approval Process
- ❖ Confined Workspace
- ❖ Sewage Treatment Systems
- ❖ Water Conveyance Systems

COMPUTER SKILLS

- ❖ AutoCAD Civil 3D
- ❖ Ajera Accounting System
- ❖ Microsoft Server 2012
- ❖ Sonicwall Hardware/Firmware
- ❖ Sharepoint 2013

CONTINUOUS IMPROVEMENT

- ❖ Organization and Work Planning

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER



**Training Proposal for:
Senga Engineering, Inc.**

Small Business \leq \$50,000

ET15-0434

Approval Date: April 7, 2015

ETP Regional Office: San Diego

Analyst: S. Godin

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
 - California: 44
 - Worldwide: 44
 - Number to be trained: 18
- Owner ☒ Yes ☐ No
- Customers Outside CA
- Out-of-State Competition: ☐ Yes ☒ No
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 15%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: \$14,040
- In-Kind Contribution: \$11,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	18	8-60	0	\$780	\$16.02
				Weighted Avg: 30			

- Reimbursement Rate: \$26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Technical/Engineering Staff, Production Personnel, Administrative Support, Supervisor/Manager, Owner
- Union Representation: ☐ Yes
☒ No
- Health Benefits: \$1.44 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1979 and located in Santa Ana, Senga Engineering, Inc. (Senga), manufacturers precision-machined components for a broad range of companies and industries, with a focus on aerospace, connector and medical industries.

This will be the second Agreement between Senga and ETP within the last five years. The Company completed its first ETP-funded project in December 2013, in which 17 workers received training. Employees were introduced to the basic concepts of process improvement and Lean manufacturing. Standard operating procedures were developed for each piece of manufacturing equipment and the Company began cross-training Lead Production Staff. This training included the Productive Laboratory (PL) delivery method. Selected trainees were introduced to International Standards Organization (ISO) and other certification training, which has helped Senga remain competitive.

Since then, orders for machined components have decreased in size and increased in frequency. The Company must continue to refine its manufacturing and business processes and services, to retain and acquire customers. The customer inspection criteria have also become more stringent, and zero defective parts per-million is standard for the industry.

To meet these requirements, Senga recently purchased new equipment: four coordinate measuring machines, a high powered computer numerical control (CNC) lathe, and a 24 Pallet Pool system. The Company began training Lead Production Staff on this equipment during the latter half of the previous Agreement and now plans to train the remaining Production Personnel.

In addition, Lean Manufacturing principles will be further incorporated across all occupations to improve production processes, product quality and frontline leadership. Continued training in AS9100/ISO900 updates will allow Senga to maintain its certifications. All occupations will receive skills training in the most recent updates in the Company's E2 ShopTech ERP system.

Employees hired subsequent to the previous Agreement will be introduced to Continuous Improvement and Lean Manufacturing principles. Advanced topics will be delivered to those trainees who participated in the first Agreement as the company continues to focus on streamlining workflow processes, eliminating waste, and reducing rework. Training will be delivered by in-house experts and contract administration will also be in-house.

Training Plan

No trainee will receive training topics they received in the prior agreement.

Business Skills - Training will be provided to all occupations in communication, product knowledge, customer relations, marketing and business development, financial accounting systems, project management and leadership. These skills will give employees the acumen to effectively implement customer solutions to increase customer satisfaction.

Computer Skills - All occupations will receive training in recent updates to the Company's ERP system (E2 Shop Tech) needed to streamline processes and improve internal/external customer responsiveness. Technical Staff, Administrative Support and Managers/Supervisors will be trained in computer software such as advanced Microsoft Word, Crystal Reports and Master Accounting Series. MasterCam, Pro-Engineer, SolidWorks and Veri-Cut design software will be offered to select Technical/Engineering and Production Personnel.

Continuous Improvement - All occupations will receive skills sets in a variety of continuous improvement topics. Employees who were introduced to Lean manufacturing in the first agreement will receive continued training needed to further improve processes and reduce waste. Topics such as scrap reduction techniques, zero waste methodologies, set-up minimization, inventory control, and continued training in AS9100/ISO9001 will provide important tools needed to maintain zero defective parts per million in the manufacturing process.

Manufacturing Skills - Production leads who were trained on the new machinery in the previous agreement will deliver equipment training to the rest of the Production workforce. Continued equipment cross-training, with expectations of achieving higher competency levels, will be offered to workers who participated in the first ETP Agreement. Training topics such as Good Manufacturing Processes, preventive maintenance, tool making and material requirements planning will provide workers with the skills needed to improve product quality and the Company's overall manufacturing processes.

Productive Lab

PL in Manufacturing Skills will be offered to 10 Production and Technical Staff in addition to class/lab training. PL tasks for the CNC Operators and Machinists will focus on machine set-up, operation, maintenance & troubleshooting. The trainers are in-house subject matter experts who are exclusively dedicated to instruction for the entire reported training time.

Senga states that PL trainers will be qualified to instruct and deliver the course content and material. Trainers will demonstrate specific set-up, operation, documentation, and inspection processes for each piece of machinery. Trainers will certify workers on the tasks once the trainees are deemed competent. At the conclusion of PL, trainees will be competent in the various production processes and techniques included in the PL curriculum, and will be able to meet minimum productivity standards.

The Company anticipates production will be lower during PL as trainees will not be expected to produce at the same output level in order to focus on product quality and zero defects. PL will allow trainees to acquire the skills sets needed to become competent in the operation of the machinery without the pressure of normal production requirements. PL will be delivered in a 1:1 trainer-to-trainee ratio and trainees will receive up to a maximum of 24 PL hours in manufacturing processes detailed in the curriculum.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
				\$ %
ET12-0262	Santa Ana	12/31/11- 12/30/13	\$24,960	\$14,001 (56%)*

*Senga documented 599 eligible training hours and was paid \$14,001. Senga states that the low performance on the previous project was caused by the lack of a dedicated in-house manager, resulting in over-reliance on the administrative subcontractor; and failure by in-house trainers to adequately document the hours of ETP-funded training.

To ensure higher performance, the Company has hired a Human Resources Manager who will be responsible for coordinating the delivery and documentation of ETP training. The Company has also developed a strategic process to assure that all training is properly documented, as outlined below:

- The HR Manager will identify all ETP-eligible training.
- The HR Manager will schedule and track attendance for all class/lab and PL sessions. The HR Manager will provide in-house trainers with necessary training materials and resources.
- The HR Manager will hold trainers to monthly training delivery deadlines.
- The HR Manager will be responsible for entries in Online Tracking.
- The Company President will review the success or failure of contract administration in quarterly performance reviews, as applicable.

In addition, the proposed project has been right-sized to \$14,040 to mirror earnings in the prior Agreement. The weighted average number of training hours is 25% less than in the previous Agreement (30 hours versus 40 hours) and less than the average number of hours completed (35) in the first Agreement.

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

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Communication Skills
- Coaching/Facilitator Skills
- Conflict Resolution
- Customer Relations
- Financial Accounting Processes
- Goal Setting/Time Management
- Leadership and Team Cohesiveness
- Marketing & Business Development
- Product Knowledge
- Project Management
- Business Writing Skills

COMPUTER SKILLS

- ERP Software (E2 ShopTech)
- Solid Works/Master Cam/Part Maker
- Crystal Reports
- Hexagon Software
- MasterCam
- Master Accounting Series
- MS Office Suite
- MS Project
- VeriCut Software
- ProEngineer Design Software

CONTINUOUS IMPROVEMENT

- AS9100/ISO9001-2008 Skills Updates
- ISO 13485 Skills
- Lean Manufacturing Concepts
- Statistical Process Control
- Material Requirements Planning
- Inspection Techniques
- Inventory Control
- Scrap Reduction Techniques
- Zero Waste Methodologies
- Set-Up Minimization
- Process & Quality Improvement Skills
- Standard Operating Procedures

MANUFACTURING SKILLS

- Equipment Operation, Maintenance & Troubleshooting
- E2 Shop Tech ERP
- Inspection Techniques
- Preventive Maintenance
- Blueprint Reading
- Good Manufacturing Processes
- Tool Making
- Inventory Control
- Material Requirements Planning

Productive Lab

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MANUFACTURING SKILLS (Ratio 1:1)

- Equipment Operation, Maintenance & Troubleshooting:
 - MoriSeiki Linear Pallet Pull System Setting, Operating, Troubleshooting and Maintenance
 - Centrifugal Barrel Tumbling Machine Setting, Operating, Troubleshooting and Maintenance
 - Lathe Setting, Operating, Troubleshooting and Maintenance
 - Mill Machines, Operating, Troubleshooting and Maintenance

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

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery PL is capped at 24 hours per-trainee.
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