PANEL PACKET

JUNE 2015

STATE OF CALIFORNIA

ETP

EMPLOYMENT

TRAINING PANEL

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Friday June 26, 2015 at 9:30 a.m.
California Environmental Protection Agency, 1001 I Street
Sierra Hearing Room, 2nd Floor
Sacramento, CA 95814
Phone: (916) 327-5640

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State of California

M e m o r a n d u m

To: Panel Members

Date June 17, 2015

From: Stewart Knox
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **June 26, 2015 at 9:30 a.m.**

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

Directions to the California Environmental Protection Agency - 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 June 17, 2015

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

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** **Coastal Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**
August 28, 2015	**California Environmental Protection Agency** **Sierra Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**
September 25, 2015	**California Environmental Protection Agency** **Sierra Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**

NOTICE / AGENDA

MEETING TIME/PLACE

Friday, June 26, 2015 at 9:30 a.m.

Sacramento Location, Full Panel:

California Environmental Protection Agency, 1001 I Street
Sierra Hearing Room, 2nd Floor
Sacramento, CA 95814
Phone: (916) 327-5640

Teleconference Location, Panel Member Ed Rendon Attending:

Omni Las Costa Hotel
2100 Costa Del Mar Road
Carlsbad, CA 92009

For further information on the teleconference location, contact ETP Administration at (916) 327-5640

AGENDA

9:30 a.m.	Call to Order by Chair • Roll Call • Agenda • Minutes	Barry Broad
9:40 a.m.	Report of the Executive Director • Legislative/Budget/Other • Request Motion to Delegate in Event of Loss of Quorum/Action • Request Motion to Adopt Consent Calendar Projects/Action	Stewart Knox
9:50 a.m.	Report of General Counsel	Maureen Reilly
10:00 a.m.	Update on Rapid Employment Strategies Pilot On Natural Disasters (RESPOND)	Peter Cooper

Panel Date: June 26, 2015

10:15 a.m.	Review and Action on Proposals	Gregg Griffin Diana Torres Creighton Chan 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, June 22, 2015 although the Panel may still change the order at the meeting.

North Hollywood Regional Office

CPH Hospital Management, LLC dba Coast Plaza Hospital ---------- $150,336
Costa Mesa Healthcare, Inc. dba Newport Sub-Acute
Healthcare Center---------- $191,520
Jewish Vocational Service of Los Angeles---------- $649,830
Meggit (North Hollywood), Inc. ---------- WITHDRAWN $749,372
Quinn Group, Inc.---------- $224,098
Westech College (Amendment)---------- $374,465

San Diego Regional Office

BAE Systems San Diego Ship Repair, Inc. ---------- $834,160
San Diego Electrical Training Trust---------- $356,362

San Francisco Bay Area Regional Office

Rambus Inc. ---------- $177,480
SavaSeniorCare Administrative Services, LLC ---------- $422,928

Sacramento Regional Office

Butte-Glenn Community College District (RESPOND)---------- $117,660
ICON Aircraft, Inc.---------- $315,540
Matsuda's by Green Acres, LLC---------- $109,206
Nor-Cal Beverages Co., Inc.---------- $135,900
Sacramento Area Regional Technology Alliance (AB118)---------- $368,280
Simpson Strong-Tie Company Inc. (Amendment) ---------- $135,090
Sparta Consulting, Inc. dba KPIT Technologies ---------- $195,672
Tiger Lines, LLC ---------- $150,480
Villara Corporation ---------- $219,360

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 05/12/2015 – 06/16/2015

≤ $100,000	Approved Date	Approved Amount
North Hollywood Regional Office		
St. George Warehousing & Trucking CO of California, Inc.	05/15/15	$99,960
Ultra Pro International LLC	06/11/15	$49,920
San Diego Regional Office		
Andrew Furuseth School of Seamanship	06/08/15	$34,650
Avanir Pharmaceuticals, Inc.	06/08/15	$64,980
Financial Statement Services, Inc.	05/26/15	$89,100
San Francisco Bay Area Regional Office		
BP Lubricants USA Inc. (Amendment)	06/03/15	$39,672
Sacramento Regional Office		
Abram Interstate Insurance Services, Inc.	05/27/15	$17,204
Altec Industries, Inc. (AB118)	05/14/15	$40,194
C&H Sugar Company, Inc.	05/18/15	$79,000
Carollo Engineering, Inc.	05/20/15	$19,390
Fidelis Marketing, Inc.	05/27/15	$16,146
Gar Tootelian, Inc.	05/15/15	$49,588
John F. Otto, Inc. dba Otto Construction	06/01/15	$67,620
Nemet Incorporated	05/20/15	$45,240

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL MEETING
California Environmental Protection Agency
1001 I Street
Coastal Hearing Room – 2nd Floor
Sacramento, CA 95814
May 21, 2015

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Sonia Fernandez
Member

Leslie McBride
Ex-Officio Member

Edward Rendon
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

Maureen Reilly
General Counsel

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL MEETING
California Environmental Protection Agency
1001 I Street
Coastal Hearing Room – 2nd Floor
Sacramento, CA 95814
May 21, 2015

I. PUBLIC PANEL MEETING CALL TO ORDER

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

II. ROLL CALL

Present
Gloria Bell
Barry Broad
Sonia Fernandez
Leslie McBride
Janice Roberts
Sam Rodriguez (arrived at 9:37a.m. after initial roll call)

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 Mr. Rendon seconded the motion that the Panel approves the Agenda.

Motion carried, 6-0.

IV. MINUTES

ACTION: Ms. Roberts moved and Ms. McBride seconded the motion that the Panel approve the Minutes from the April 22, 2015 meeting.

Motion carried, 6-0 carried.

V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, said following the last Panel meeting in April, we have about the same number of projects in the Agenda for May. Mr. Knox introduced Greg Griffin from the North Hollywood Office, Willie Atkinson from the Sacramento Regional Office, and Creighton Chan from the Foster City Office who will present single and multiple employer proposals.

Mr. Knox said we currently have $3M available through the Alternative Fuel and Technology Program in partnership with the California Energy Commission. The Panel also received $2M in General Funds to serve workers and employers impacted by the drought under the RESPOND Program. We have $140 remaining for this Fiscal Year (FY) with no outstanding projects coming forward this year.

Regarding CORE funding, to date, the Panel has approved an additional $3.6M with another $581,000 approved by Delegation Order. Should the Panel approve all the projects before it today, approximately $8.6M will remain for the FY. We amended this year's allocations to bring down liabilities giving us the ability to move more funds for FY 2015/16.

Single Employer Contracts were allocated $48.8M; and after today's meeting, if approved, there will be approximately $5.3M remaining. Multiple Employer Contracts (MECs) were allocated $15.5M. After today's meeting, approximately $1.2M will remain in that fund. Small Business Contracts were allocated $5.4M; after today's meeting, we'll have approximately $327,000 remaining. Critical Proposals were allocated $6.1M, and after today, we'll have approximately $1.1M remaining. Apprenticeships Projects were allocated $10.1 M, and to date there is approximately $830,000 remaining. If all projects are approved today, the Panel will have about $8.6M left in contracting capacity through the end of this year.

Under Delegation Order, Small Business was reduced to $50,000, and other proposals were capped at $100,000 to be approved by the Executive Director on a continuous flow basis, and as of today we have approved 12 projects totaling over $580,000.

For the FY 2015/16 to date, we have approximately 326 projects. We divided the application process into two parts. The first round was in April 1, 2015 for MECs and Apprenticeship Programs; all other projects were submitted after May 1, 2015. All projects have a value just under $60M. Financially we are looking very strong going into the next fiscal year.

Regarding the Fund Status Report, looking at FY 2014/15, the funds were brought down to $86M to bring down the liabilities. The previous year contract liabilities were at $24M. That amount was increased to $27M, which will allow us to have more funding moving into the next FY. We have $140 remaining for the RESPOND funds, and $9M left in contracting capacity for FY 2014/15. We will have approximately $8.5M in projects for the upcoming June meeting.

Potential funding of applications and demands are still in the regional offices for this FY. Single Employer Contracts requests are $5.3M; we have about $5.4M in remaining. MEC proposals in regional offices are about $298,000 in demand; with $1.1M remaining. Small Businesses have $327,000 in demand; $383K in remaining. Critical Proposals is at $883,000

in demand; we have about $1.1M remaining. Although those figures can change as we know depending on Go-Biz. Apprenticeships: $803,000 in demand with approximately $7.5M remaining. Overall funds left after today is approximately $8.6M; about $7.5M in demand. We are in good shape finishing up this FY.

Regarding the number of projects remaining in regional offices today: Single Employer Contracts 25; MEC's 3; Small Business 6; Critical Proposals 3, and Apprenticeship 2; total of 39 projects. We have 21 projects ready to go for the upcoming Panel meeting in June. Most of the projects will be completed this FY. AAU reported 18 projects; 12 more came in. They are working diligently to get those projects in the regional offices.

Mr. Knox introduced David Lanier, Agency Secretary and Andre Schoorl, Undersecretary, California Labor Workforce and Development Agency.

David Lanier, Agency Secretary, Labor Workforce and Development Agency

Mr. Lanier said, we are expecting another robust drought report tomorrow, with the caveat that we continue to see serious regional challenges. It's exciting to be a part of a rebounding economy, and to see the turnaround that the state has gone through in the last few years. It really speaks to the importance of the work that we are all doing to solidify that expansion, and that rebound for the future, and to really tackle areas where we have had serious challenges in the entire Central Valley in particular. The work of the Panel, as a partner with the Labor Workforce and Development Agency (LWDA) and with the administration, is critical in that. We've got overwhelmingly bipartisan legislation out of the Congress, on workforce innovation.

The Employment Training Panel, Employment Development Department, California Labor and Workforce Development Agency, California Workforce Investment Board, and California Department of Industrial Relations, all these key partners, came together and looked at how we do workforce and training. The system on how we meet in that parlance of the workforce world, and economics, how we match supply to demand with the employer community and workforce, those are our big challenges. The work of the Panel is really critical. I would like to commend the Panel and the staff for their hard work and partnership in that effort. The transition they have made in targeting sectors is the key to our workforce development efforts to match supply and demand, so that we have the trained workforce that the employers need.

We know that the demand is there; the baby boomers are leading. Fifty percent of the senior leaders in the public sector are now eligible for retirement, and that is mirrored in the private sector as well. We have to train and develop the new workers for the next decades ahead. I want to commend the Panel for being focused on the areas that we know are so critical in the long term, and in the short term. Again, I would like to commend the Panel for all their efforts.

There was a bit of a funding glitch a year or so ago, and I'm pleased to see that we have worked through that. We have learned some good lessons from that experience. It's exciting to see the updated numbers, and the opportunities we face in the future. Again, thank you for the opportunity to be here, and keep up the good work.

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

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

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

Motion carried, 7 – 0.

VII. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Mr. Knox asked for a motion to adopt Consent Calendar Items #1 and #2.

Heart Hospital of BK, LLC dba Bakersfield Heart Hospital……..$248,000
Penhall Company……$159,300

ACTION Ms. Roberts moved and Ms. Bell seconded the approval of Consent Calendar Items #1 and #2.

Motion carried, 7 - 0

VIII. REVIEW AND ACTIONS ON PROPOSALS

<u>Single Employer Proposals</u>

CalPortland Company

Greg Griffin, Manager of the North Hollywood Regional Office, presented a Proposal for CalPortland Company (CalPortland) in the amount of $270,360. Founded in 1890, CalPortland provides diversified building materials and construction solutions to the Western United States and Canada. Training will take place at company locations in Glendora, Santa Maria and Santa Ana.

Mr. Griffin introduced Mimi Tran, Manager.

Ms. Roberts asked, is your company training going to encompass almost all your employees here in California, and do you have a good system behind you to make sure that you can succeed? Ms. Tran said, yes. We hired ADP services to help manage our program.

Mr. Broad said, with first time contracts that are doing a fairly ambitious training, especially in the construction industry, where you’re responding to seasonal demand, that can be a bit of a challenge. I hope you’re really keyed into that. Ms. Tran said, I take ownership of the training, and that’s the reason why we hired ADP, so they can assist us.

Ms. Bell said, if you find that you’re struggling, just reach out to your regional office manager because we want you to succeed. Ms. Tran said, yes.

Mr. Rodriguez asked, how did you hear about the ETP Program and what motivated you to apply? Ms. Tran said, ADP came out to help us and we heard it through them.

Ms. Fernandez asked, since you are training your entire workforce, what is the level of commitment from your leadership to ensure that everyone is covered and will receive the training that they need? Ms. Tran said one hundred percent.

ACTION: Mr. Rendon moved and Ms. Roberts seconded the approval of the Proposal for CalPortland Company in the amount of $270,360.

Motion carried, 7 – 0.

Kinkisharyo International, LLC

Mr. Griffin presented a Proposal for Kinkisharyo International, LLC (Kinkisharyo), in the amount of $354,000. Founded in 1920, Kinkisharyo designs, manufactures, and maintains low-floor light railcars for transit agencies worldwide.

Mr. Griffin introduced Grace Adhikari, Vice President of Finance, IT, Contracts and Administration.

Ms. Roberts said it's exciting to have somebody that has established themselves here in California, especially in the manufacturing business, which is a priority industry. Ms. Roberts asked, regarding the capability of your infrastructure around training, do you have a dedicated staff at each one of the facility to administer training? Who will be assisting you to be able to pull it all together, and get this training completed? You don't have a secondary administrator or subcontractor, can you do it all? Ms. Adhikari said, we started the operations in July 2013. How they train is on-the-job training. They hire a group of individuals and train them in various aspects. Depending on where their skills fit, we move them to wiring or assembly; that was the intent in the beginning. We've gone through a lot of learning experiences, and since then we have actually documented our training programs. We now have classroom training that is developed professionally by our marketing department. We've identified the workers' skills, and in addition to that, we have identified where the gaps and skills lie. Now our trainees go through a second round of training. Although we have an HR manager at corporate office, we've also hired a secondary dedicated HR Manager in Palmdale to facilitate the training. We have a couple of administrative assistants there who are familiar with the forms. Our general and production manager are on board the scheduled training. Beyond that, our corporate parent is providing tremendous support to us. During the first year, they sent us 20 Japanese workers who had built these cars since 1920. Their job is to show people how to perform the job. For each phase of the training, they send an instructor to assist us. The trainees will learn how to assemble the pieces together during the first phase of the training. By the end of the year, they will learn how to weld the actual pieces of cars together and assemble the train. Our corporate office will be sending us instructors to assist us in training our workers. On top of that, we supplement the training with classroom training and on-the-job training.

Ms. Roberts said, it sounds like you have a great training plan in place ahead of you. Our database here with ETP is a challenge in itself, you need to understand that. We have a great staff here that offer support, so if you need help, just give us a call. This is a great project. Do you have a Learning Management System (LMS) in place, and how do you plan to track your roster? Ms. Adhikari said our roster is set up manually on an Excel Spreadsheet. We have an administrative assistant dedicated in this training program. We also work with Monique Webb, analyst from the North Hollywood Regional Office. She's been very helpful in assisting and supporting us all along through the process.

Mr. Rodriguez asked, in terms of the pipeline of local workers in your Palmdale office, are you facing challenges in finding local job seekers over there, or has that been resolved? Ms. Adhikari said, the first phase is hiring the assemblers. It wasn't too difficult to hire those workers because they can be trained to build and assemble parts. The second phase is the welding piece, and that is where we are finding a little bit more difficulty. We are looking at various types of avenues to advertise. Mr. Rodriguez said, the level of unemployment is relatively high in the Palmdale area compared to the city of Los Angeles, we're very familiar with the demographics of the city and the surrounding areas, we've very happy that you are here.

Ms. Bell asked, is Palmdale your main office in California? Ms. Adhikari said, Palmdale is our manufacturing facility dedicated for the Los Angeles Project. Our corporate office is in EL Segundo.

ACTION: Mr. Rodriguez moved and Ms. Bell seconded the approval of the Proposal for Kinkisharyo International, LLC in the amount of $345,000.

Motion carried, 7 – 0.

Quest Diagnostics Incorporated

Mr. Griffin presented a Proposal for Quest Diagnostics Incorporated (Quest) in the amount of $424,926. Quest provides diagnostic testing information and services that patients and doctors need to make better healthcare decisions. The Company also provides a wide range of products and services that benefit healthcare providers, pharmaceutical medical device companies, life insurance companies, and employers.

Mr. Griffin introduced Ripka Fox, Senior Director and Kimberly Goldman, Senior Communications Specialist.

Mr. Broad asked, you haven't had a proposal in the last five years; have you brought any proposals before the Panel since then? Ms. Fox said, we had one project presented to the Panel in the past. Mr. Griffin said, if it's outside the five-year window we don't have those numbers.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the Proposal for Quest Diagnostics Incorporated in the amount of $424,926.

Motion carried, 7 – 0

Ralph's Grocery Company

Mr. Griffin presented a Proposal for Ralph's Grocery Company (Ralph's) in the amount of $424,650. Ralph's implemented two new software programs for its logistic division: an automated order fulfillment system (Witron), and a management application program (DC1C). Warehouse Staff and Drivers will participate in Computer Skills and Productive Lab training to operate both systems to complete work orders.

Mr. Griffin introduced Cynthia Lavia, Senior Human Resource Manager.

There were no questions from the Panel.

ACTION: Mr. Rodriguez moved and Ms. Roberts seconded the approval of the Proposal for Ralph's Grocery Company in the amount of $424,650.

Motion carried, 7 – 0

The Kroger Company

Mr. Griffin presented a Proposal for The Kroger Company (Kroger) in the amount of $424,224. This will be the second ETP Agreement for Kroger. Training delivered under ET07-0109 trained staff to run machinery, and learn Company procedures and methods being used during that time. Since then, Kroger has purchased new equipment and updated computer systems as well as company procedures. Training to be delivered under this project will teach staff to operate new machinery and teach new processes that will increase efficiency.

Mr. Griffin introduced Teresa Gonzalez and Marcos Rojas, Representatives.

Ms. Roberts asked, the manufacturing part of the business, is it your entire private label, is that what you're doing in your manufacturing? Ms. Gonzalez said, yes. We manufacture products that go to our local stores, and also our sister stores out-of-state as well, that are within the Kroger Company.

Mr. Rodriguez said, just for the record for the Panel, what are the sister companies within the Kroger flow chart in California? Ms. Gonzalez said, we have 33 manufacturing facilities across the United States. We have our Compton Creamery, Riverside Creamery and La Habra Bakery. Mr. Rodriguez asked, do you also service Ralph's and Food 4 Less? Ms. Gonzalez said, yes we service them as well. We have over 400 stores across Southern California; that is primarily the product that we produce to service the stores here in California. Mr. Rodriguez asked, is California your largest market in terms of your national footprint? Ms. Gonzalez said, we have other areas within the United States that we service, but in California, the stores that I mentioned are the ones we service.

ACTION: Ms. Roberts moved and Mr. Rodriguez seconded the approval of the Proposal for The Kroger Company in the amount of $424,224.

Motion carried, 7 – 0.

Riverside Healthcare Systems, LP dba Riverside Community Hospital

Mr. Griffin presented a proposal for Riverside Healthcare Systems, LP dba Riverside Community Hospitals (RCH) in the amount of $272,750. This will be the fourth Agreement between RCH and ETP within the last five years.

Mr. Griffin introduced Lee Albanese-Alhorn, Director of Education and Julie Curtis, Assistant Chief Nursing Officer.

Ms. Roberts said, great contract and performance. Whatever model you're using is what you need to pass on to others. Ms. Roberts asked, is there a reason why you're asking for less than you have requested from your last contract? Ms. Albanese-Alhorn said, we had our substantial contribution.

There were no further questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the Proposal for Riverside Healthcare Systems, LP dba Riverside Community Hospital in the amount of $272,750.

Motion carried, 7 – 0.

<u>Multiple Employer Contracts</u>

Tooling Manufacturing University – Society of Manufacturing Engineers

Mr. Griffin presented a Proposal for Tooling Manufacturing University – Society of Manufacturing Engineers (ToolingU) in the amount of $192,500. ToolingU is a provider of manufacturing-specific training products and services. ToolingU works with manufacturers to build training programs and support workforce learning initiatives.

Mr. Griffin introduced Brian Hogan, Chief Executive and Gretchen Schultz, Workforce Development Coordinator.

There we no questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Rendon seconded the approval of the Proposal for Tooling Manufacturing University – Society of Manufacturing Engineers in the amount of $192,500.

Motion carried, 7 – 0.

Associated General Contractors of America, San Diego Chapter, Inc., Apprenticeship & Training Trust

Mr. Griffin presented a Proposal for Associated General Contractors of America, San Diego Chapter, Inc., Apprenticeship Training & Trust in the amount of $327,200. They are proposing to train 155 Apprentice and Journeyman.

Mr. Griffin introduced Glen Hillegas, Executive Vice President and Jack Chapel, Education Coordinator.

Mr. Broad asked Mr. Hillegas if they are a union. Mr. Hillegas said no. Mr. Broad said, there is no JATC here, is it unilateral? Mr. Hillegas said, it's a Joint Apprenticeship Committee. Mr. Broad asked, who are the employees that serve on the committee? Mr. Hillegas said, the apprentices and a few journeymen serve on the committee. Mr. Broad asked, how many companies participate in this? Mr. Hillegas said, currently there are 282 participants. Mr. Broad asked, is the training program a cross trade between the carpenters, cement mason, laborer, drywall latherer, and painters, are they all separate categories? Mr. Hillegas said, each one has their own standards with the state, and with their classes, so each group receives their own construction education. The advantage we have is that we can train all the categories altogether. We create projects where the teachers can work together with their students in different trades. They all work together so we are able to create projects that all the trades can work on with their instructors during their own trades, while they are on the job site. It's a real advantage for us.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the Proposal for Associated General Contractors of America, San Diego Chapter, Inc., Apprenticeship Training & Trust in the amount of $327,200.

Motion carried, 7 – 0.

Local Government Commission (RESPOND)

Willie Atkinson, Manager of the Sacramento Regional Office presented a Proposal for Local Government Commission (LGC) in the amount of $127,880. The LGC is a nonprofit organization fostering in environmental sustainability, economic prosperity and social equity. LGC is helping to transform communities through practical assistance, working with a network of local elected officials and other community leaders.

Due to current drought conditions and new water conservation regulations enacted by multiple state entities, there is a substantial need for training at the local government level. In particular, training is necessary for municipalities to ensure compliance with Storm Water Regulations, the Sustainable Groundwater Management Act, and Sustainable Community Strategies Act.

LGC has been working in collaboration with the Governor's Office of Planning and Research (OPR) on how to educate local agencies in drought response. LGC is requesting a higher reimbursement rate of $26 per hour for participating employers; under RESPOND this is authorized for good cause. LGC will obtain a union support letter prior to training
Mr. Atkinson introduced Danielle Dolan, Water Programs Project Manager and Mike Snead, Sierra Consulting.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the Proposal for Local Government Commission in the amount of $127,880.

Motion carried, 7 – 0.

Amendments

Alameda County Electrical Joint Apprenticeship and Training Committee

Creighton Chan, Foster City Regional Office Manager presented an Amendment for Alameda County Electrical Joint Apprenticeship and Training Committee (Alameda Electrical JATC).

Alameda Electrical JATC requests additional funding of $194,948 to restore a reduction that occurred when the current contract was approved by the Panel a year ago. At that time, funding was "right-sized" to $166,164 from a request for $501,200. Right-sizing was based on performance under an active contract as measured by training hours entered into ETP Online Tracking.

Mr. Chan said this proposal first appeared at the Panel meeting on February 2014. At that time there was an active agreement that ended in October 24, 2014, and there were still some number of months remaining in the contract. ETP right sized the contract down, and the Panel advised Alameda Electrical JATC to return for the remainder, once they've shown performance.

Alameda Electrical JATC came back for an amendment in April even though the previous contract ended in October; they showed 100% performance. There was a lag time in presenting the amendment. Alameda Electrical JATC wanted to make sure that there was performance on it, and that the retention period was included. If you recall the apprenticeship program, they were allowed 500 hours and 150 days; it wasn't the normal 90 day retention period. So it took a little bit longer for them to get the figures to us. They are now coming forward with this amendment and they are requesting that this amendment be dated retroactively to October 22, 2014.

In summary, the amendment will increase the total agreement amount by $191,943. This includes the support costs of $12,439; increase the number of journeymen by 47 and the total number of apprentices by 51. It would also increase the average training hours for journeyman from 22 to 40, and allow for an effective date of October 22, 2014.

Mr. Chan introduced Byron Benton, Training Director, and John Bauer, Executive Director for the Workforce and Economic Development at California Labor Federation.

Ms. Roberts said, the contract term date is March 3, 2014 to March 2, 2016, why are we considering a retroactive date of October 22, 2014 when it seems like it falls within that contract term? Mr. Chan said, this one is the current contract; the one they are amending the funds to. The contract which we were holding them to show performance on was the next one that ended in October 21, 2014. Mr. Broad said it's the prior contract. Mr. Chan said, that was the contract in question when they came to us. They came to us early and we told them that it was too soon. So we right-sized it down, and now they are coming back. We

told them, once you have demonstrated performance on that contract, and then you may come back. This one here is the current contract, this is the one they are amending.

Mr. Broad asked, Mr. Brauer, have you gone forward since October and done the training? Has there been training performed under this contract? Mr. Brauer said, yes. Mr. Broad said, here's the deal, obviously we don't generally favor retroactive contracts. However, we don't want to put people into some kind of a bureaucratic nightmare situation, and the apprenticeship program, where retention takes longer, and we're telling them not to come back too early, so then they wait, but they are moving their process forward in the meantime; we right-sized the contract and asked them to do it into two pieces. We don't want to make it impossible for them to ask. This is a perfectly reasonable request, in this case for it to be retroactive, and the performance is good. I don't think there is a policy issue for us on this, in my opinion.

Mr. Brauer said, we've demonstrated our desire, willingness, and patience to work with you over the last year on this process. We have been trying to help the International Brotherhood of Electrical Workers (IBEW) serve large numbers of small businesses under the government definition of that. The economy has been growing, and we think that they been playing an important role in that piece. As the Panel has been understanding both the funding situation and systems, and whether we are going to do an amendment or a new application, we appreciate your consideration today. We are planning on coming back with new applications in the near future. The last thing I'd like to say, since the Secretary is sitting here, we brought you some suggestions relative to apprenticeship and a process over all that we would still like to engage the Panel around in creating that process not only for construction, but other utilization of funding for apprentice programs going forward. We would like to have that conversation, to bring in our JATC's and other entities to talk about how to make that piece work both for you and for us and to streamline the process and make it easier.

Mr. Rodriguez said, before you advance forward that topic, I'm a little confused. I would like to address this question to the Executive Director. In requesting to an administrative procedure, which is to basically move back that date, is that a Panel vote or can that be done with your authority? Mr. Knox said, I think it's best if it is brought before the Panel. We had a discussion about this issue, and we felt that it was best to bring it before the Panel. Mr. Broad said, they have to bring a request for an amendment back to us, and I think that's wiser if we are dealing with a change in our general rule. Generally we approve prospective contracts, not retroactive contracts. If we did that, people would show up all the time. However, the apprenticeship programs are sufficiently unique in this regard, and that they have an ongoing curriculum, and the students are moving through on a multi-year basis. We are trying to create a situation that integrates with that.

Mr. Broad said, in terms of your question about changing the process, I think we should revisit that. Although I had the impression that things were moving pretty smoothly for you with us. Mr. Brauer said, things are going well. I would encourage you to consider some of the suggestions we made about having a specific point in time based on knowing what the budget is going to be for the year of setting some money aside, and having an application process that encompasses all the monies, and what that looks like in terms of performance and renewal. I still think that it's possible to streamline it even more. The other piece of it from the backend is the range of the apprentice programs that we have. I have some fairly

large ones that we want to bring to you, where the money is not as critical, as it was the two gentlemen that were here today. The smaller IBEW's with a lot of small businesses where your money has frankly been as critical as their own employer funds, to re-upping up their program and getting them going as the economy has gone forward. To the extent that there is greater predictability particularly from the smaller ones

Mr. Broad said, that is worth talking about, but I don't want to create a situation where we are creating an annual appropriation for a specific set of apprenticeship programs, which may vary in quality. What if somebody who didn't do it before shows up here with that request? There are issues regarding that. We try to make it as predictable as possible by creating buckets of money that we are projecting in our budget to go to each area that we fund, including apprenticeship programs, but I don't know if it would make sense. I'm not ruling that out the idea that we would go to an even more allocated model. I know that would be helpful from your perspective, but it might be a little bit hanky from ours. We'll talk about it

Mr. Brauer said every time I turn around our governor is articulating the benefits of apprenticeship, I think the performance of the workers speaks for itself.

Mr. Rodriguez said I understand what you're saying but I really appreciate the ETP approach of having category buckets. Because the fund is tied to a specific tax, so during economic turns there is a swing, and we saw that in 2009 at ETP. I think the discussion is wanted, it's warranted, but that's my concern for the moment.

Mr. Brauer said to be clear, were not advocating a pot of money for construction apprenticeship. What we are asking you to do is to start engage around apprenticeship in general, and one particular aspect, the nature of the construction industry is different than other apprentice types that are getting created or moving forward.

Mr. Broad said, although we are funding apprenticeship program at a level far greater than its percentage of the economy. You guys are getting a big amount of funding.

Mr. Brauer said, for a model of training and employment progression and clear pathways, and everybody seems to be in agreement where it goes.

ACTION: Mr. Rodriguez moved and Mr. Rendon seconded the approval of the additional funding for Alameda County Electrical Joint Apprenticeship and Training Committee in the amount of $191,943.

Motion carried, 7 – 0.

Mr. Benton said, when we talk about this new green economies in the 21st century, we, in our training center, are a zero net building. There are aggressive goals in California by 2030, that 50% of the existing commercial buildings will be zero net, meaning you produce as much energy outside as you use, and 50% of the existing commercial buildings will be zero net. To do that, we have to have a highly trained workforce keeping up with these technologies and we need more instructors. We need to reduce the instructor-to-student ratio. I can't tell you how much I thank you for your support in helping us make that happen.

San Francisco Electrical Industry Apprenticeship and Training Trust

Mr. Chan presented an amendment for San Francisco Electrical Industry Apprenticeship and Training Trust (SF Electrical JATC) in the amount of $194,948. SF Electrical JATC is requesting an additional funding of to restore a reduction that occurred when the current contract was approved by the Panel a year ago. We downsized them in February, and they are coming back. SF Electrical JATC would like the Panel to allow an effective date of October 29, 2014.

Mr. Chan introduced Peter Curshin, Assistant Training Director and John Bauer, Executive Director for the Workforce and Economic Development, Cal Labor Fed.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and there was a second on the approval of the additional funding for San Francisco Electrical Industry Apprenticeship and Training Trust in the amount of $194,948.

Motion carried, 7 – 0.

IX. SMALL BUSINESS INCENTIVES FOR A MEC

Mr. Knox said, I will go over the PowerPoint presentation. We're looking at some of the questions that Ms. Roberts and Mr. Broad brought up at the last meeting. We will take a look at a five-year average time period, to get an idea where we've been, and what's taken place. The approved small business, single employer contract funding in the last five years, the portion less than $50,000, a good proportion, that is 94%; the other 6% is above $50,000 mark.

Completed contracts for small business, MECs and single employer contracts combined, 90% are within the MECs participating employers, and 10% are single employers. So obviously were doing a really good job. We want to continue to grow that proportionally, and also encourage the MECs to develop these projects.

Ms. Roberts asked, were you surprised with that number? We talked a lot about it; it's such a small percentage that it seems to be a non-entity group. Mr. Knox said, Ms. Robert's point is well taken. I can't say we we're surprised, we knew that a good proportion of those amounts were going through the MECs. I think the issue, if we go back a little bit, is the dollar amounts of the ones less than $50,000. We look at them through the Delegation Order and they're still coming through. If we can help assists the MECs, encourage them to go there, that would be good too, and there's also a timing issue.

Regarding the small business incentive funding cap, the current MEC cap at Panel is $950,000, and $100,000 by Delegation Order; that continues, that's what's standard. The MEC cap with the small business incentive, and we kind of count that through the PILOT, we increased that amount to $1.2M. Again, with the $250,000 boost for SB Demand, with justification from the Panel. So what we really looking at is, if you're coming in at the $1.2M, you could have come in at $950,000 anyway and got that amount to do any MEC and any

size of business. If you're going up to the $1.2M, I see it as job numbers. It's probably too simplistic. So let's say Job #1, all those businesses that are above that $100,000 and anything above that or below that mark could make up the $250,000. They don't have to go up to $250,000. They can take a lower amount. So they can come in at $1M or they can come in at $980,000, but anything above the $950,000 has to be a small business. That is the reason for the boost of the dollar amount.

In regards to small business incentive cap lock for the FY 2015/16, if they are going above the $250,000 amount, the funds cannot be shifted. Let's say they come back to us, and say, we're going to serve almost all the large businesses, you can't move that money out of the $250,000. That amount has to be stagnant within that job number. That's the way that would work.

The other question that came up at the last couple of Panel meetings, and we've had a discussion about it, are the small business incentive hours on the cap. On this issue, specifically the community colleges, there was a complication if you're developing MECs, as they don't always know all of the employers within the MEC when they are in the development stages. So there's a good proportion that is further developed later. Currently for single employer contracts, the range remains at 8 to 60 hours per trainee, and justification is needed for 61 to 200 hours. In a MEC, however, we are asking for an increase of hours to 200. The new range would be 8 to 200 hours per trainee with no justification needed for 200 hours. So again, if a MEC is developing these contracts over time, basically they can come in and say, we'll go up to the 200 hours. They may never hit the 200 hour mark for most of those job orders, under small business, but it gives them the flexibility to do that. Also, keep in mind, we typically have one year, on the small employers, especially through single employer contracts. This are for the contracts under the MECs. So you may have a long period of time when you're working with that small business to encourage that number of hours of training. So for the Panel today, look at the 200 hour mark and see if that is something that you are willing to move up to.

Mr. Broad asked, how do you see this as an incentive for them? Mr. Knox said, part of the conversation, specifically with the community colleges, and some of the other MECs that work on small business projects, it's when they are developing the projects. They may not always have all of those businesses, we don't know. When they come before us, they might have 20 or 40 businesses that they are going to be working with. As they do outreach to those businesses, one, it's a marketing tool to those businesses to say, you can do between 8 to 200 hours. Many of those businesses, especially if they can go up to the two-year period, may do that over a longer period of time. So it's mostly an outreach and marketing tool that get those businesses involved in that conversation.

Mr. Broad asked, how do we know that we won't wind up with the situation where people default to 200 hours? In other words they're padding the training and getting into the bank accounts more than they should? Mr. Knox said, the regional offices will work with those local contractors as they currently do, and we basically right-size most of those businesses when they come through. Our staff will look at the training plan and the curriculum, help design that curriculum during the process and then make those decisions with that business and the MEC.

Mr. Broad said, that makes sense to me except that when this whole idea came up, the question was raised that our staff doesn't have the time to look at these proposals. When I look at the MECs that come through, whatever is our maximum, that's what they ask for. Whatever is the total dollar amount they can ask for annually, they generally ask for. We won't always be in an upward swinging economy. We will be swinging down again, and then will be cutting these things. Mr. Knox said, absolutely. Mr. Broad said, what's going to happen, inevitably, next time the business cycle goes in the other direction? I just want to make sure that you're confident that we have the staff resources to look at these contracts so that we are not getting 200 hours on a constant basis. 200 hours of training is almost equivalent to six weeks. For five to six solid weeks of full time work, per worker to get trained, that's a large amount of training. Mr. Knox said, we totally agree upon that. The one point that I think that the MECs have on that is, if they are now allowed to go to two years of training, you may have points in time when they are doing two weeks here three weeks here. Just because of the flexibility within that side of it, up to the 200 hours may be more realistic. What this is allowing them to do, basically, is to give them more flexibility within the system to build a program that is necessary for that small business.

Ms. Reilly, General Counsel, said, Mr. Chair, the 200 hours is the outside edge in a given job number per small employer. It may only be 5 trainees who need the 200 hours. The average hour is what that project's costed that on. You may have an average hours of 50, and a handful of trainees are going for certification, and they want the 200 hours. It just gives them that flexibility. Mr. Broad said, I just worry that wherever we set, it becomes the benchmark, because that has happened. Mr. Knox said, that's why we're going to call it a Pilot, and I fully agree with you. What we can do is look at it over a period of one year, and see how that works. One, on the $250,000 boosts, plus one on the 200 hours, and then come back to the Panel. We have 3 entities that came in at $1.2M mark, so there wasn't a big rush of MECs that wanted to come in at that level. As a matter of fact, a couple of the community colleges even talked to me and said that they wanted to stick with the $950,000 to be safe, which is good. Mr. Broad said, I agree. So your staff will monitor these statistics and actively ensure that nobody is floating for any reason. Mr. Knox said, yes, absolutely.

Mr. Knox said, what I'm looking for an approval on, is to move it up to the 200 hours from the current rate, which is up to 60 right now, with justification. We already have in the rules and regulations up to the 200 hours with justification, it just takes that out. Mr. Broad asked, how long are we doing this Pilot project for? Mr. Knox said, we will do this through June 30, 2016. Mr. Broad said, ok, so this is a one year Pilot.

Ms. McBride asked if we are meeting the needs of the small businesses in different regions. Mr. Knox said, one of the things in our conversations, and that's one of the pieces that staff is currently working on; we can't shift favoritism to any one MEC, obviously. One of the talks we've had in the past is about actually having a map of California. We need to match it up with the regions with the Labor Agency, the Work Investment Board, looking at established MECs within those regions and basically letting the customer know that they have a MEC within their certain area. If they're not willing to go to that MEC, they're still welcome to come directly before the Panel to ask for the funding.

Ms. McBride said, one of my concerns is that the small businesses are not being under-served. If they don't have a MEC within close proximity that can take care of them, they can still come to us and we would welcome them with open arms. Mr. Knox said, absolutely. Mr. Broad said, that's a good point.

Mr. Knox said, one of the things that myself, Robert Meyer, and his staff have been actively doing is working with the WIBs in the last 6 months, and with the community colleges and talking about designing online curriculum that you can look at, and actually see what is provided. From there, we can refer the small business, from that stand point, to which community colleges that provide the specific curriculum that can meet their needs. If not, our doors are always open to provide services.

Mr. Broad asked, we're not restricting this to MEC's at community colleges, right? Mr. Knox said, no, not at all. This can be any MEC's. CWA is a great example, and I would like to thank Steve Duscha, for pushing through a training that was up in Yuba City. An employer wanted to get it done immediately. CWA picked up that training within 2 days. I'm not sure where you're at in terms of getting that designed and implemented, but in 2 days, we had a MEC pick up the training. It's a great example.

There were no further questions or comments from the Panel.

Mr. Broad said, the motion would be to raise the cap to 200 hours without justification for a one year period, and your staff will report back at the end of the year to tell us how this is working, and whether it's accomplished a goal. Mr. Knox said, absolutely.

ACTION: Mr. Rendon moved and Ms. Roberts seconded the motion to raise the small business cap to 200 hours without justification for a one year period.

Motion carried, 7 – 0.

X. PUBLIC COMMENTS

Steve Duscha, Consultant

Steve Ducha said, I have a question about the $1.2M cap, it's been discussed for the last several months, and one of the things that I recall was mentioned was that it would not apply to JAC apprenticeship contracts. Mr. Knox didn't mention that today and I hope that the JACs would not be discriminated against in that cap under that current plan. Mr. Knox said, I understand your question; I will let Ms. Reilly address that question.

Ms. Reilly said, I think you know that we have a blended rate for journeyman training under the JATC taking into account that they are placed for a given job with a large or small employer and you really can't tell; and that was a problem in the past with trying to figure out how to enroll them. So they journeyman are blended, the same holds true for the apprentices that may be placed with a large or small employer at any point in time during their on-the-job training which is the retention period. So we really don't see a small business distinction in the JATC. Participating employer makeup is signatory employer makeup. So no, this would not apply. This is an incentive for small businesses as participating employers in the MEC.

Mr. Duscha said, I would point out that in the JACs that I am involved in, more than half sometimes two thirds, sometimes even more of the employers are small businesses. I understand that the rate under the construction industry would not be hired for small businesses, but this is about raising the cap for small business, it seems unfair.

Mr. Broad said, it does and it doesn't. We're not talking about the apprenticeship program bringing in more employers. The employers subject to the collective bargaining are limited. What you're saying is our money would increase so that the employer contribution would decrease, that's what you're saying in an apprenticeship program. What we're talking about here is encouraging these MECs to produce new employers. Now if the union goes out and is organizing new employers that are participating through collective bargaining, then it would make total sense. There are more employers that cost more; we'd like to ask for more. Mr. Duscha said, what you're doing is increasing the cap. I believe that most of your existing MECs are already doing $250,000 worth of small business so what the proposal is, would be to increase the cap to accommodate those small businesses. This isn't increasing small businesses, it's shifting small businesses to this extra $250,000 that's all. Mr. Broad said, if you came back in a year from now, you wouldn't be able to tell me that a larger number of the employers in the construction industry are being served, unless more employers sign a collective bargaining agreement. Part of what we're doing here with them is we deal with the staff spending enormous amount of time on individual small businesses that are applying themselves, and the staff time there exceeds the value of the contract itself. Mr. Duscha said, that's true, but that has nothing to do with the cap, that has to do with the referrals. Mr. Broad said, that's an incentive for them to take more. Mr. Duscha said, no, the cap is the cap. Mr. Broad said, ok send us a letter outlining the logic and I would be happy to review it. Thank you.

XI. MEETING ADJOURNMENT

Ms. Roberts moved and Mr. Rendon seconded meeting adjournment at 10:53 a.m.

Single Employer Contractor

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

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

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

CPH Hospital Management, LLC dba Coast Plaza Hospital

Agreement Number: ET15-0475

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	SET Priority Rate Medical Skills Training	Industry Sector(s):	Healthcare Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 1,400	U.S.: 1,400	Worldwide: 1,400
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$150,336		$0	$0		$150,336

In-Kind Contribution:	100% of Total ETP Funding Required	$170,200

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate Medical Skills Training	Business Skills, Computer Skills, Continuous Improvement, MS - Preceptor, MS -Didactic	144	8-200	0	$1,044	$20.55
				Weighted Avg: 58			

Minimum Wage by County: $20.55 per hour for SET/Priority Industry Statewide.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $3.00 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Registered Nurse		80
Licensed Vocational Nurse		10
Surgical Tech		5
Physical Therapist		2
Occupational Therapist		1
Medical Tech		4
Respiratory Therapist		10
Radiology Tech		4
Lab Tech		5
Case Manager		3
Analyst		10
Administration		10

INTRODUCTION

CPH Hospital Management, LLC dba Coast Plaza Hospital (CPH) (avantihospitals.com) is a subsidiary of Avanti Health System, LLC. CPH is an accredited general acute care medical and surgical hospital with 117 licensed beds. It is well-equipped with state-of-the-art radiological diagnostic machinery (CT Scan, Ultrasound services, and an Open MRI), laboratory services, and a hospital-wide patient monitoring telemetry system. In addition to a 24-hour emergency department, the hospital also offers an Alzheimer's program, cardiac care, cosmetic surgery,

critical care, diabetes care, hyperbaric oxygen, pain management, pharmacy, respiratory care, weight-loss, and wound care. This will be CPH's second ETP Agreement

With the passing of the Affordable Care Act (ACA) in 2010, hospitals are currently challenged to provide high quality, affordable patient care services. As a result, hospitals must focus on providing care to predetermined and nationwide standards, reducing readmissions, and tightening operations. These changes represent major challenges for the hospital industry, as reimbursement funds from insurances and the federal government move from a quantity reimbursement framework to a quality based framework. These requirements are particularly challenging for smaller community hospitals such as CPH.

CPH is committed to quality patient care for the community, while ensuring their employees gain and maintain the knowledge, skills, and abilities needed to care for its underserved population. With the help of past ETP funding, CPH has provided education to ensure ACA understanding and devise strategies aimed at meeting ACA policy requirements. CPH continues to respond to changes by educating staff in measuring new ACA quality indicators, ensuring tight staffing in nursing and support services, implementing and improving the electronic medical record system that assists with data tracking, effecting close examination of patient readmissions and improving care coordination. Proposed ETP-funded training efforts expand on addressing communication between care providers, leadership education on ACA impact, customer service, and challenge management to develop new and cost effective ways of operations.

Training in the first Agreement emphasized mainly the implementation and training of CPH's electronic medical records system and medical skills training. Training in this Agreement will focus on the recent enactment of the ACA implementation in an effort to meet the deadline dates for healthcare over the next several years. To meet these deadlines, CPH will deliver continuous training. Training will focus on case management and care coordination, refining and updating electronic medical records to meet these standards, as well as increasing patient satisfaction. Training will be offered to newly graduated nurses and incumbent workers in nursing and allied health.

PROJECT DETAILS

Training Plan

All trainees will receive Medical, Business, Computer, and Continuous Improvement skills.

Business Skills (1%) – Training will be offered to all occupations as process improvement, project management, communication, and customer service skills are the cornerstone of quality patient initiatives. Training is expected to increase patient safety and satisfaction, improve employee engagement, and consequently, federal reimbursements that will ensure organizational viability.

Computer Skills (1%) – Training will be offered to all occupations as the Electronic Medical Recordkeeping (EMR) system is the major mode of patient communication. Updates and refinements to the current EMR system are ongoing. Implementing the current EMR system requires improved computer skills for CPH patient care employees. Training is expected to improve patient communication among all healthcare providers, improve data inputs and outputs, and required reporting, as well as streamline workflows.

Continuous Improvement (8%) – Training will be offered to all occupations to increase patient care and satisfaction, as well as promote continual employee growth. Training will ensure

improved customer service, and instill proper knowledge for new initiatives. Training will help employee professional development and staff retention.

Medical Skills Training (MST) (90%) – Didactic training may be offered to all occupations and clinical preceptor training to incumbent and newly graduated nurses as well as other incumbent and new clinical occupations (respiratory, radiology, laboratory). Training will be required to complete a period of clinical preceptorship training based upon patient care responsibilities to ensure adequate and safe application of attained knowledge. In addition, for incumbent trainees, increasing professional knowledge inclusive of anticipated new patient populations (stroke and sepsis) and inception of nurse cross-training will ensure proper equipment use and patient treatment.

Special Employment Training

Under Special Employment Training (SET), an employer is not required to demonstrate out-of-state competition. Trainees employed in a Priority Industry qualify for a SET wage modification up to 25% below the statewide average hourly wage. Contractor is requesting a wage modification of $20.55.

Commitment to Training

CPH's training budget is approximately $200,000 per year, including training in continuous improvement, customer service, on-boarding orientation, new graduate nurse training, infection prevention, wound care and prevention, defendable documentation, point of care, various "on-the-unit" in-service, leadership, and basic computer skills for all employees, and ACA staff implementation training. CPH also provides training for various certifications and mandatory courses (e.g. yearly medical/surgical skills validation; bi-monthly specialty skill validation). Most prior training was job specific, although customer service and EMR training was company-wide.

With support of ETP funding, CPH has updated and expanded its new graduate nurse program. Now, ETP funds will help support the additional cross-training required for incumbent nurses to learn new skills pertinent to different areas of the hospital, and to develop mentor programs across all occupations so new employees may benefit from such programs.

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

- Training Infrastructure

Since training is ongoing at CPH, the hospital is ready to begin training upon project approval. Two employees are dedicated to ETP administration. One full-time educator oversees contract administration such as scheduling training and enrolling. A part-time employee is dedicated to tracking and entering information into the ETP on-line tracking system. This person is also charged with communicating with ETP, providing progress reports to CPH administration, working with the educator throughout the Contract term, and managing all invoicing.

Impact/Outcome

CPH's overall training goals include increasing quality, accessible healthcare to the community by providing quality patient care, demonstrating communication improvement and awareness and increasing patient satisfaction and outcome; as well as increasing employee engagement and participation within the organization. ETP training will help CPH employees be more active

in caring and communicating, resulting in increased interdisciplinary teamwork and patient satisfaction.

Medical Skills Training

The Panel has established a reimbursement rate of $22 per hour for nurse and allied healthcare upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. This rate will apply to the Medical Skills training only.

RECOMMENDATION
Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0285	Norwalk	02/06/12 – 02/05/14	$300,090	$220,004 (73%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Project management
- Communication
- Customer Service

COMPUTER SKILLS

- Accounting & Payroll Software Applications
- Electronic Medical Record
- Microsoft Office/Excel Skills (Intermediate & Advanced)

CONTINUOUS IMPROVEMENT

- Assaultive Behavior Training
- Case Management/Discharge Planning
- Charge Nurse Training
- Communication Skills
- Conflict Resolution
- CORE Measure
- Crisis Prevention Intervention (CPI)
- Critical Thinking Skills
- Culturally Appropriate Care
- Customer Service
- Decision Making
- Documentation Skills
- Frontline Leadership
- Just-in-Time Processes
- Medical Records Coding
- Organizational/Time Management Skills
- Preceptor Skills
    - Teaching
    - Adult Learning
    - Mentoring
    - Evaluation Skills
- Problem Solving
- Production Operations/Workflow
- Project Management
- Quality Improvement Concepts
- Quality Methods for Monitoring Products during Production
- Scheduling
- Teambuilding

MEDICAL SKILLS
0-200 hours

DIDACTIC

- Acute Myocardial Infarction
- Advanced Cardiac Life Support (ACLS)
- Arterial Blood Gas (ABG) Interpretation
- Basic Life Support (BLS)
- Body Mechanics
- Breast Feeding & Lactation
- Case Management
- Care of the Cardiac Patient
- Care of Pediatric Patients (Acute/Intensive
- Care)
- Care of the Stroke Patient
- Central Lines Management
- Conscious Sedation
- Chest Tube Care & Management
- Code Blue Response & Procedures
- Critical Care Nursing Skills
- Decontamination Procedures
- Diabetes Care & Management
- Dysrhythmia Recognition & Interpretation
- Educating the Patient & Family
- EKG & Cardiac Monitoring
- Electronic Fetal Monitoring (Beginning & Advanced)
- Emergency Care of the Burn Patient
- Emergency Room Nursing Skills
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and etc.)
- Environmental Safety
- Evidence Based Practices
- Gastrointestinal Assessment and Management
- Hemodynamic Monitoring
- Infection Control
- Intravenous (IV) Insertion & Therapy
- Kinetic Therapy
- Labor, Delivery and Postpartum Nursing Skills
- Laboratory Skills
- Medical Record Coding
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation
- Neonatal Advanced Life Support (NALS)
- Neonatal Infant Pain Scale (NIPS)
- Neonatal Nursing Skills
- Neonatal Resuscitation Provider (NRP)
- New Graduate Nursing Skills
- Neuro Nursing Skills
- Occupational Therapy Skills

- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Patient Satisfaction
- Pediatric Advanced Life Support (PALS)
- Perioperative Nursing Skills
- Physical Therapy Skills
- PICC Line Insertion
- Pre and Post-Operative Care
- Radiology Skills
- Rapid Response Skills
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Speech Therapy Skills
- Care of the Ill Infant (S.T.A.B.L.E.)
- Stroke
- Sepsis
- Telemetry Nursing Skills
- Total Parenteral Nutrition (TPN)
- Transfer Techniques
- Triage Nursing Skills
- Trauma Nursing Skills
- Ventilator and Tracheotomy Care
- Wound & Skin Care

CLINICAL PRECEPTOR

- **Ancillary Services Training**
  - Medical Records Skills
  - Nutritional Services Skills
  - Social Worker Skills
  - Environmental Safety Skills
  - Infection Prevention Skills
  - Clerical Skills

- **Case Management Department Training**
  - Case management Skills
  - Communication Skills
  - Equipment Skills
  - Crisis Intervention
  - Assessment Skills
  - Care Plan Development
  - Follow-up Skills
  - Sepsis & Stroke
  - Referral Skills
  - Human Trafficking

- **Emergency Department Training**
  - Emergency Room Nursing Skills
  - OB Trauma
  - Triage Nursing Skills
  - Conscious Sedation
  - Care of Pediatric Patients
  - Pain Management
  - Vaso-Active drip management
  - Stroke Training
  - Infection Control
  - Equipment Training
  - Sepsis & Stroke
  - Psychiatric Emergencies
  - Management of Aggressive/Assaultive Behavior
  - Human Trafficking

- **Intensive Care Unit/Critical Care Unit Training**
  - Critical Care Nursing Skills
  - Code Blue Response & Procedures
  - Patient Assessment & Care
  - Intra-Aortic Balloon Pump (IABP)Therapy
  - Ventilator & Tracheotomy Care
  - Hemodynamic Monitoring
  - Vaso-Active drip management
  - Pre and Post-Operative Care
  - Pain Management
  - Stroke & Sepsis Training
  - Infection Control
  - Equipment Training
  - Organ Donation
  - Medication Safety

- **Laboratory Services Unit**
  - Equipment Training
  - Laboratory Skills
  - Bloodborn Pathogens
  - Venipuncture
  - Laboratory Testing Procedures
  - Infection Control

- **Medical/Surgical Unit Training**
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
  - Pre and Post-Operative Care
  - Orthopedic Nursing Skills
  - Equipment Skills
  - Infection Control
  - Medication Administration & Management

- Pain Management
- Sepsis & Stroke
- Dysrhythmia identification and management
- Medication Safety

- **Operating Room & Post-Anesthesia Care Unit (PACU) Training**
  - Patient Assessment & Care
  - Conscious Sedation
  - Trauma Nursing Skills
  - Pre & perioperative Nursing Skills
  - Pre and Post-Operative Care
  - Equipment Skills
  - Infection Control
  - Malignant Hyperthermia
  - Medication Administration & Management
  - Pain Management
  - Sepsis & Stroke
  - Medication Safety

- **Pediatric Services Unit**
  - Care of Pediatric Patients (Acute Care, Intensive Care)
  - Patient Assessment & Care
  - Pre and Post-Operative Care
  - Equipment Skills
  - Infection Control
  - Patient Assessment & Care
  - Pediatric Advanced Life Support (PALS)
  - Medication Administration & Management
  - Sepsis and Stroke
  - Respiratory Assessment & Care
  - Infection Control
  - Medication Safety

- **Radiology Services Unit**
  - Radiology Skills
  - CT Skills
  - MRI skills
  - Ultrasound Skills
  - Equipment Skills
  - Patient Assessment & Care
  - Patient Fall Prevention
  - Infection Control
  - Stroke

- **Rehabilitation Services Unit**
  - Physical Therapy Skills
  - Occupational Therapy Skills
  - Speech Therapy Skills
  - Patient Assessment & Care

- Kinetic Therapy
- Post-Operative Care
- Care of the Stroke Patient
- Care of Cardiac Patients
- Patient Fall Prevention
- Equipment Skills
- Infection Control
- Sepsis & Stroke

- **Respiratory Services Unit**
  - Respiratory Assessment & Care
  - Code Blue Response & Procedures
  - Advanced Cardiac Life Support (ACLS)
  - Basic Life Support (BLS)
  - Patient Assessment & Care
  - Care of Pediatric Patients
  - Care of the Cardiac Patient
  - Ventilator & Tracheotomy Care
  - Neonatal Resuscitation Provider (NRP)
  - Equipment Skills
  - Infection Control
  - Sepsis & Stroke

- **Telemetry Unit Training**
  - Care of the Cardiac Patient
  - EKG & Cardiac Monitoring
  - Dysrhythmia Interpretation
  - Telemetry Nursing Skills
  - Pre and Post-Operative Care
  - Stroke Training
  - Intravenous (IV) Therapy
  - Equipment Skills
  - Infection Control
  - Sepsis & Stroke
  - Medication Safety

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

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Matsuda's by Green Acres, LLC

Agreement Number: ET15-0470

Panel Meeting of: June 26, 2015

ETP Regional Office: Sacramento **Analyst:** L. Fraizer

PROJECT PROFILE

Contract Attributes:	Retrainee Seasonal Priority Rate	Industry Sector(s):	Wholesale Trade Retail Priority Industry: ☒ Yes ☐ No
Counties Served:	Sacramento	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 199	U.S.: 199	Worldwide: 199
Turnover Rate:	12%		
Managers/Supervisors: (% of total trainees)	1%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$109,206		$0	$0		$109,206

In-Kind Contribution:	100% of Total ETP Funding Required	$109,206

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, HazMat., Literacy Skills, Management Skills	38	8-200	0	$630	$15.75
				Weighted Avg: 35			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, HazMat., Literacy Skills, Management Skills	95	8-200	0	$810	$15.75
				Weighted Avg: 54			
3	Retrainee Seasonal Priority Rate	Business Skills, Commercial Skills, Continuous Improvement, HazMat., Literacy Skills	6	8-200	0	$1,386	$15.75
				Weighted Avg: 77			

Minimum Wage by County: Job Numbers 1-3: $15.75 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 $3.82 per hour may be used to meet the Post-Retention Wage for Job Numbers 1-3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Plant Maintenance Staff		17
Administrative Staff		6
Mechanic		2
Manager		4
Driver		3
Sales Staff		6

Job Number 2		
Sales Staff		39
Customer Services Staff		20
Manager		8
Maintenance Staff		15
Administrative Staff		13
Job Number 3		
Seasonal Plant Maintenance Staff		6

INTRODUCTION

Matsuda's by Green Acres LLC (Matsuda's) proposes to serve as the lead in a single employer retraining contract with its affiliate, Green Acres Nursery and Supply Co. (Green Acres).

Founded in 1957, Matsuda's is a large 160 acre wholesale nursery located in Folsom. Matsuda's is a quality grower of woody ornamental and perennial plants. The Company sells products to independent garden centers, box stores and landscape contractors and designers. Established in 2003, Green Acres is a commercial nursery that operates high volume garden centers which offer a variety of indoor and outdoor pants, fertilizers and irrigation products. This proposal will include four Green Acres commercial nurseries, and Matsuda's single wholesale nursery.

Matsuda's by Green Acres, LLC is eligible for standard retraining as a company that provides a service in California that regularly competes with service providers located out-of-state, as outlined under Title 22CCR Section 4416(d)(3). Matsuda's is identified as a NAICS priority industry Company engaged in Wholesale Trade/Distribution.

Green Acres Nursery & Supply LLC, is eligible for standard retraining as a company that provides a service in California that regularly competes with service providers located out-of-state, as outlined under Title 22CCR Section 4416(d)(3). Green Acres Nursery is identified as a NAICS non-priority company engaged in retail.

PROJECT DETAILS

Training will focus on Management and Business Skills to improve leadership, safety in the workplace and administrative processes. In addition training will encompass Continuous Improvement to expand Lean Manufacturing procedures and Commercial Skills to train on equipment including loading carts, forklift, and tractor.

Matsuda's is upgrading and expanding its facility to increase capacity for production of the nursery stock for sale to garden centers. The Company plans to purchase a new planting machine, and update their green house and propagation facilities. Matsuda's will promote and cross-train current employees to enhance their skill set in various departments and operations. Green Acres opened a new facility in Elk Grove in March of 2015. The Company plans to advance its inventory management system, improve plant material and product mix, introduce drought and irrigation advancements, and implement continuous improvement techniques to bring consistency throughout the organization as a whole. ETP funds will assist the Company in meeting customer demands, remaining competitive, and ensuring project integrity.

Training Plan

Training will be delivered in a classroom/laboratory setting in the following types.

Business Skills (15%): Training will be offered to all occupations. Training will include Accounting, Leadership and Communication Skills. Training will help streamline company goals, improve accounting experience, and provide quality customer service.

Literacy Skills (5%): Training will be offered to all occupations to improve communication and enhance teamwork and efficiency. These skills will improve employees' ability to understand direction, processes, goals, and will result in a safer and more productive workplace.

Commercial Skills (30%): Training will be provided to Plant Maintenance Staff, Maintenance Staff, Mechanics, Drivers and Managers. Training will include Machine Maintenance, Forklift and Tractor Operation, Trenching and Shoring, and Pesticide Application. Training will improve employee proficiency in the use of new machines, development and management of new crops, workflow processes and safety guidelines. Cross-training will improve workforce efficiency despite seasonal fluctuations in sales and help reduce layoffs. Training on Troubleshooting will ensure efficiency and productivity in the workplace and reduce costs.

Hazardous Material (15%): Training will be offered to all occupations and will focus on improving the safety of the workplace for all employees. Proper Safety Training will improve employee knowledge and skill handling hazardous materials, to reduce the potential for accidents or spills.

Management Skills (10%): Managers will receive training in Decision making, Teambuilding, and Leadership Development to build a foundation in which management staff can provide constructive feedback, participate in decision-making, as well as coach employees to achieve performance goals.

Computer Skills (10%): Training will be offered to Administrative Staff, Sales Staff, Customer Service Staff, and Managers. Training will include QuickBooks and advanced Microsoft Office Suite to enhance staff's technical skills, manage production costs and maintain quality during growth.

Continuous Improvement (15%): Training will be offered to all occupations and will help eliminate waste and improve processes. Lean Manufacturing and Process Improvement will enable the Company to reduce cost by eliminating waste; ensure quality and continuous improvements resulting in efficiency and productivity in the workplace.

Commitment to Training

Matsuda's currently has an annual training budget of $135,000 which includes companywide production and machine operation training. Job specific training encompasses Lean Manufacturing and basic skills for entry level positions. 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

  Matsuda's Company Director of Operational Development and a team of Human Resources Professionals will be responsible for scheduling training and collecting completed rosters. Matsuda's is using Sierra Consulting Services as their contract administrator for the enrollment and tracking of trainee hours.

Retention Modification

The six Seasonal Plant Maintenance Staff (Job Number 3) also qualify for a modified retention period of no less than 500 hours within 12 months of the end-of-training. These workers work approximately six months out of the year. Matsuda's requests this retention modification for Job Number 3.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Matsuda's retained Sierra Consulting Services in Cameron Park to assist with development of this proposal for a flat fee of $10,500.

ADMINISTRATIVE SERVICES

Matsuda's also retained Sierra Consulting Services 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
- Conflict Resolution
- Communication Skills
- Dealing with Difficult People
- Leadership Skills
- Planning and Organization
- Product Knowledge
- Time Management

COMMERCIAL SKILLS

- Forklift/Tractor Training
- Planting
- Pruning
- Grafting
- Machine Operation
- Machine Maintenance
- Pesticide Application
- Production Operations
- Trenching/Shoring
- Installing Irrigation Systems
- Cross Training on Production Equipment/Skills
- Troubleshooting

COMPUTER SKILLS

- Advanced Microsoft Office
- QuickBooks

CONTINUOUS IMPROVEMENT

- Lean Manufacturing
- Lean Procedures Practice
- Productions Operations/Workflow
- Process Improvement
- Project Management
- Problem Solving and Decision Making
- Quality Management
- Root Cause Analysis
- Statistical Process Control

HAZARDOUS MATERIALS

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

MANAGEMENT SKILLS (Managers Only)

- How to Coach and Mentor
- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership Development
- Motivation
- Supervisor Skills
- Teambuilding
- Employee Coaching
- Essential Skills for the New Supervisor

LITERACY SKILLS

- Vocational English as a Second Language
- Basic Math

Note: Reimbursement for retraining is capped at 200 hours total per-trainee, regardless of method of delivery. Literacy training cannot exceed 45% of total training hours per trainee.

RETRAINEE - JOB CREATION

Training Proposal for:

Nor-Cal Beverage Co., Inc.

Agreement Number: ET15-0471

Panel Meeting of: June 26, 2015

ETP Regional Office: Sacramento **Analyst:** W. Sabah

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative HUA	Industry Sector(s):	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Orange, Yolo	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Nor-Cal Beverage Company Employees Union Local 916		

Number of Employees in:	CA: 430	U.S.: 433	Worldwide: 433
Turnover Rate:	18%		
Managers/Supervisors: (% of total trainees)	10%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$135,900		$0	$0		$135,900

In-Kind Contribution:	100% of Total ETP Funding Required	$341,682

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Cont. Imp., Hazardous Materials, Mgmnt. Skills, Mfg. Skills	123	8-200	0	$540	$11.99
				Weighted Avg: 30			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Hazardous Materials, Mgmnt. Skills, Mfg. Skills	62	8-200	0	$540	$16.02
				Weighted Avg: 30			
3	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Cont. Imp., Hazardous Materials, Mgmnt. Skills, Mfg. Skills	40	8-200	0	$900	$14.00
				Weighted Avg: 45			

Minimum Wage by County: Job Number 1(HUA): $11.30 per hour in Yolo County; Job Number 2: $16.02 per hour in Orange County; and Job Number 3(Job Creation): $13.35 per hour in Orange County.

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

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

Up to $2.02 per hour 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 & Support Staff		15
Blending Staff		10
Bottling and Dispatching Staff		6
Maintenance Staff		15
Mechanic		6
Operations Staff		17
Process and Service Staff		15
Quality Assurance Technician		5

Repacker		2
Sanitation Specialist		3
Warehouse Technician		18
Supervisor & Manager		11
Job Number 2		
Administrative & Support Staff		8
Blending Staff		14
Bottling and Dispatching Staff		4
Gatekeeper		2
Operations Staff		3
Materials Clerk		3
Mechanic		9
Microbiologist		1
Production Staff		8
Quality Assurance Technician		2
Supervisor & Manager		8
Job Number 3		
Blending Staff		2
Chemist		1
Mechanic		3
Microbiologist		1
Operations Staff		17
Production Staff		6
Quality Assurance Technician		3
Sanitation Specialist		3
Supervisor & Manager		4

INTRODUCTION

Founded in 1937 and headquartered in West Sacramento, Nor-Cal Beverage Co., Inc. (Nor-Cal Beverage) (www.ncbev.com) is a large co-packer and manufacturer of teas, chilled juices, waters and energy drinks. This includes the proprietary go Girl® energy drink. The Company also provides solutions such as sales, services and installation of food and beverage systems to customers ranging from convenience stores to biotech labs. Nor-Cal Beverage has six different production and distribution facilities in Yolo and Orange counties. All six locations will participate in training under this proposal.

Need for Training

Nor-Cal Beverage recently obtained their Food Safety System Certification (FSSC) 22000, which has allowed them to develop and implement documentation control, continual process improvement, internal audit training, and food safety. The FSSC 22000 defines requirements for integrated processes that control and minimize food safety hazards. Employees require training to maintain consistency, standardize best practices, and reduce food safety hazards. In addition, FDA regulations require Nor-Cal Beverage to comply with quality assurance, PH level control

and contamination prevention, while still meeting customer demand for timely delivery. On-going training is needed to ensure correct production methods and testing processes are adhered.

The Company installed new equipment. Nor-Cal Beverage is expanding its manufacturing capabilities at the Anaheim production facility by adding new tunnel pasteurization and 'can line' capabilities. The Company is also installing new manufacturing equipment including depalletizers, empty can conveyer, full can conveyer, GPI packer, case packer, and full case conveyers at the Anaheim facility. Employees need training to increase knowledge and skills on all equipment, including solutions and facility maintenance through continuing education in refrigeration, machine maintenance and installation.

This is the fourth proposal for Nor-Cal Beverage: the second proposal in the last five years. During the prior ETP contract, Nor-Cal Beverage focused on obtaining the FSSC 22000 certification. In the current proposal, the Company plans on developing staff production efficiency and increasing knowledge for career development. Training in this proposal will not duplicate the training in the prior contract, but build on the course topics previously delivered.

Retrainee - Job Creation

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

In this proposal, Nor-Cal Beverage has committed to hiring 40 new employees (Job Number 2) at the Anaheim production facility to assist with the operation of the new machinery and distribution center. Training on the new machinery will increase efficiencies through process improvement techniques, and employees will be able to retain their positions and grow within the Company. Nor-Cal Beverage 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

Nor-Cal Beverage will provide between 8-200 hours of Class/Lab training.

Business Skills (5%): Training will be offered to Gatekeepers, Materials Clerk, Warehouse Technicians, Supervisors, Managers, Administrative and Support, Bottling and Dispatching, Process and Service Staff. Training will focus on the improvement of internal processes to promote administrative efficiency and to provide staff with the knowledge and skills to run the business effectively. Training topics include Communication and Interpersonal Skills, Customer Service, Leadership Development, Billing, Accounting, Inventory, and Shipping and Receiving.

Computer Skills (5%): Training will be offered to all occupations. Trainees that did not receive training in the prior contract will receive training on computer software that is essential to their job functions. Training will focus on inventory maintenance, production scheduling, financials and system usage required by customers. Training topics include Intermediate/Advanced Microsoft Office, SAP, ADA System, AVAIL, AS400, VIP, Kronos and Maintenance Connection.

Continuous Improvement (15%): Training will be offered to all occupations to ensure that Nor-Cal Beverage remains competitive in their industry. These skills will enable employees to

improve quality, productivity and food safety. Training includes Handling Customer & Consumer Complaints, Trainer-the-Trainer, Contractor & Visitor Management and Machine Safeguarding.

Hazardous Materials (5%): Training will be offered only to staff members that are exposed to hazardous materials, specifically Mechanics, Maintenance, Operations, and Production Staff. Training will focus on the safe handling of hazardous materials and will include Hazardous Energy Control, Blood Borne Pathogens, Compressed Gas Management, Waste Management and Respiratory Protection

Management Skills (10%): Training will be offered to Supervisors and Managers. This training will focus on enhancing skills to create a productive work atmosphere to motivate staff, positively lead staff, and coach staff. Training includes Conflict Resolutions, Goal Setting, Effective Meetings for Leaders and Coaching Your Team Members.

Manufacturing Skills (60%): Training will be offered to Mechanics, Quality Assurance Technicians, Sanitation Specialists, Warehouse Technicians, Blending, Bottling and Dispatching, Maintenance, Operations, Process and Service Staff. Staff will receive training on old and new equipment used at the Anaheim facility. Training will focus on new processes and routine maintenance of equipment. Training includes FSSC 22000 Implementation training, Blending, Bottle Liner Filler, Cleaning & Sanitation of Equipment, and Depalletizer Operation.

Temporary to Permanent Hiring

Approximately 10 trainees in Job Number 3 come under Panel guidelines for “temporary to permanent” employment. Nor-Cal Beverage 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. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by Nor-Cal Beverage. Until then, the Company may not receive progress payments.

High Unemployment Area

The 123 trainees in Job Number 1 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company’s locations in Yolo County qualify for HUA status under these standards. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Nor-Cal Beverages requests a wage modification to $11.99 per hour for trainees in Job Number 1.

Commitment to Training

Nor-Cal Beverage has an annual training budget of $163,000 for the West Sacramento and Anaheim facilities. The training budget includes state-mandated safety training, equipment maintenance and installation, food safety and security, and sales training.

Nor-Cal Beverage 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

Nor-Cal Beverage has two full-time employees that will administer the ETP project. The Human Resources Director will have the primal responsibility of enrolling and tracking with the assistance of the Human Resources Coordinator. In addition, the Company identified approximately 11 employees and trainers to be responsible for scheduling, delivering, documenting and managing training.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Nor-Cal Beverage under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0331	Anaheim, Fullerton, Galt, Loomis, West Sacramento	03/26/2012-03/25/2014	$441,520	$135,719 (31%)

Nor-Cal Beverage completed 31% of the approved contract amount. According to the Company, training under prior contract was delayed due to their focus on achieving the FSSC 22000 certification. For this proposal, the Company developed a job progression matrix and identified numerous training skills, processes and operations of specific equipment to ensure completion of 100% of ETP-funded training. In addition, the current proposal has been “right-sized” constant with prior earning.

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

- Communication and Interpersonal Skills
- Customer Service
- Leadership Development
- Billing
- Accounting
- Inventory
- Shipping & Receiving

COMPUTER SKILLS

- Microsoft Office Suite (Intermediate/Advanced)
- SAP (Enterprise Resource Planning system)
- ADA System
- AVAIL
- AS400
- VIP – Inventory System
- Kronos
- Maintenance Connection

CONTINUOUS IMPROVEMENT

- Business Goals & Objective
- Continual Improvement
- Emergency Response Plan
- Handling Customer & Consumer Complaints
- Internal Audit
- Internal & External Communication
- Records Keeping
- Train-the-Trainer
- Emergency Preparedness & Response Plan
- Flammable Liquid
- Fire Protection/Fire Control
- Hot Work
- Contractor & Visitor Management
- EOSH Performance Measurement
- Fleet Management
- Machine Safeguarding
- Acetylene Fuel & Gas Safety
- Asbestos/Asbestos Awareness
- Battery Handling/Changing/Charging
- Chemical Hygiene for Laboratories
- Cranes & Other Hoisting Equipment
- Elevating Work Platforms & Aerial Devices
- Emergency Action Plan
- Fire Extinguisher & Fire Fighting Equipment
- Fire Prevention & Emergency Plan

- Industrial/Lift Trucks (Forklifts) & Tractors
- Injury & Illness Prevention Program
- Supervisory Safety Training & Accident Investigation
- Machinery & Equipment
- Welding & Cutting Safety - Hot Work

HAZARDOUS MATERIALS

- Hazard Communication
- Hazardous Energy Control
- Management Hazardous Materials
- Safety & Environmental Training:
  - Blood Borne Pathogens
  - Compactor Safety Training
  - Compressed Gas Management
  - Confined Space
  - Electrical Safety
  - Emergency Preparedness & Response Plan
  - Energy Efficiency & Best Practices
  - Ergonomics/Safe Lifting JSA Review
  - Fall Protection
  - First Aid
  - Forklift Safety/Lift Truck
  - Hand Tool Safety
  - Hearing Conservation
  - Heat Stress
  - Local Exhaust Ventilation
  - Lockout-Tagout/Machine Safety Guarding
  - Material Handling Equipment
  - Ozone Protection
  - Personal Protective Equipment
  - Respiratory Protection
  - Slips, Trips and Falls/Ladder Safety
  - Spill Prevention & Control
  - Storm Water Protection
  - Traffic Route
  - Waste Management
  - Waste Water Management
  - Water Resource Sustainability

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Management Responsibilities
- Attendance Management
- Conflict Resolution
- Goal Setting
- Interviewing Skills
- Perfecting Performance Evaluations
- Effective Meetings for Leaders
- Finance and Financials for Non-Finance Managers
- Leadership and Team Building
- Safety and the Supervisor
- Incident Investigation
- Hiring and Retaining Staff

- Addressing Sub-Par Performance
- Coaching Your Team Members
- Time Management
- Effective Communication Skills
- Wellness Training

MANUFACTURING SKILLS

- Allergens Procedure
- Calibration
- Control of Non-Conforming Products
- Document Control
- Food Safety Card
- Food Safety Requirements
- Food Safety & Quality Card & Policy
- FSSC 22000:2005 Implementation Training
- General HACCP Awareness Training
- Glass Breakage Procedure
- GMP Program
- Material and Product Integrity
- Process Flow Maps and Control Points
- Process Integrity
- QMS ISO 9001:2008 Implementation Training
- Food Security

Positional Manufacturing Skills:

- AROL Capper - Static Torque Testing
- ATP Sanitation of Monitoring - Filler Valves
- Batch Adjustment Procedure
- Blend Aseptic
- Blend Sheet Documentation
- Blending
- Boiler Start Up - Muira Boiler
- Bottle Line Filler and HTST Cleaning In Process
- Calcium Check Sheet
- Calibration & Determination of Brix - RFM745 Refractometer
- Calibration & Measurement
- Can Filler and HTST - Solbern Cleaning In Process
- Can Line Filler and HTST - Solbern CIP
- Carrier Check in Policy
- CCR Truck Loading Process
- Cleaning In Process
- Cleaning & Sanitation of Equipment
- Coupling Tractor to Semitracker
- Crown Filler Valve Rebuild/Repair
- Cryotech Injection - Quick Service
- Damaged Goods Receipt Process
- Distribution Center Finished Goods Damage Processing
- Distribution Center Trash Compactor Operating Procedure
- Depalletizer Operation
- Determination of Alkalinity

- Determination of Brix – Refractometer
- Determination of Caffeine, Benzoic Acid & Sorbic Acid
- Determination of Caffeine, Benzoic Acid & Sorbic Acid by HPLC
- Determination of CO2 & Air Content in Cans
- Determination of Free & Total Chlorine
- Determination of Hardness
- Determination of Iron
- Determination of pH
- Determination of Titratable Acid
- Disposal of Trademark Materials
- Drain Cleaning – Packaging
- Electric Lift Charging
- Emergency Procedure: Hard Water at Surge or Low Water Level
- Enumberation of T/C & Coliform by Membrane Filtration
- Enumeration of Lactic Acid Bacteria - Finished Product
- Enumeration of T/C & Y/M
- Evaluation of Aseptic Packages
- Facility Maintenance/Monthly Audit Check
- Fall Protection
- Flavor Change Can Lines
- Foamer Set-Up and Operation Can/Bottle
- Fueling Procedures
- Fueling Procedures at Card Lock Location
- Good Laboratory Practices
- HACCP OPRP Training
- High Sheer Mixer Operation
- Hot Work Permit Program
- How to Verify Product Fill Weights
- ILS Cycle Count Process
- ILS Tag Creation
- ILS Truck Loading Process
- Inspection for Glass Removal Prior to PET Run
- Inventory Control - Cold Box Delivery for Blending
- Ladder Inspection Program
- Leakage Detection Fluid
- Loading Trailers - Bay 5
- Lockout/Tagout
- LPG Tank Replacement Work Instruction
- LTO Line Checks
- Maintenance Procedure and Food Safety
- Meurer Casepacker and Multipacker Operation
- Microbiological Incubation Time Temperature
- Microbiological Monitoring Program
- Miura Blowdown Procedure
- Operation of Bottle Filler
- Operation of Canalyzer
- Operation of Crown Filler - Can Line
- Operation of Douglas Casepackers
- Operation of Filtec DUD Detector
- Operation of Floor Scrubber

- Operation of Fuji Labelers
- Operation of Line Monitoring and Testing
- Operation of Markem Case Coder
- Operation of Riverwood - Can Line
- Operation of Sentry Palletizer
- Operation of Shrink Wrap Machines
- Operation of Silgan Vision DUD Detector
- Operation of Solbern Filler - Can Line
- Operation of Videojet Coding System
- Operations Line Monitoring and Testing
- Organic Requirements
- Organoleptic, Evaluation: Taste, Odor, Color, & Appearance
- Pallet Collapse Handling Guidelines
- Pallet Inverter Operating Procedure
- Procedure for Cleaning Return Line
- Procedure for Filling CO2 Tanks
- Processor Operation
- Product Change – Downline
- Product Hold Process
- Ratio Blend Cleaning In Process
- RCS High Flow Air Sample
- Receiving & Inspection of Packaging Materials
- Receiving Base Drums for Batching
- Receiving Raw Ingredients
- Receiving, Testing, & Inspecting HFCS/Liquid Sucrose
- Recycling
- Safety Training - LPG Fueling of Forklifts
- Servicing Repairing Refrigeration Systems
- Shuttle Procedures
- Spill Prevention, Control, and Counter Measures
- Staging & Verification of Ingredients for Blending
- Staging Dry Ingredients - Aseptic Blending
- Steps for Placing Finished Products on Hold
- Steps for Placing Materials & Ingredients on Hold
- Storing Finished Goods that Contain Allergens Procedure
- Tetra Filler Operation
- Tetra Pak Straw Applicator
- Total Coliform & E Coli by Colibert Presence/Absence Method
- Tunnel Pasturization
- Verification & Use of Torque Meter
- Water Filling Electric Forklift Batteries
- Wyred Palletizer Operation

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.

EMPLOYEES NCB UNION 916

April 24, 2015

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

RE: ETP Training Program

Nor-Cal Beverage Company Employee's Union supports ETP training program in Nor-Cal Beverage Company, Inc.'s facilities in West Sacramento, California, which will provide our members with the skills needed to meet customers' requirements, which in turn will provide a secure work environment for the future.

Sincerely,

Russell Geer
President

Panel Amendment #1 Proposal for:

Simpson Strong-Tie Company Inc.

Agreement Number: ET15-0330

Amendment Effective Date: June 1, 2015

Panel Meeting of: June 26, 2015

ETP Regional Office: Sacramento **Analyst:** L. Fraizer

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee Job Creation HUA - Retrainee	Industry Sector(s):	Manufacturing
Counties Served:	San Joaquin	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No	Priority Industry:	☒ Yes ☐ No
Current Contract Term:	November 17, 2014 to November 16, 2016	Substantial Contribution:	☐ Yes ☒ No

CURRENT FUNDING

Current Funding
$26,160

AMENDMENT FUNDING

Requested Funding	Total Funding
$135,090	$161,250

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	Continuous Impr; Mfg Skills	**125**	8-200	0	**$1,242**	$15.00
				Weighted Avg: **69**			
2	Job Creation	Continuous Impr; Mfg Skills	5	8-200	0	$1,200	$14.90
				Weighted Avg: 60			

INTRODUCTION

Founded in 1956 and headquartered in Pleasanton, Simpson Strong-Tie Company Inc. (SST) (www.strongtie.com) is a subsidiary of Simpson Manufacturing Company, Inc. SST is a large supplier of structural building products, and serves customers in commercial and residential construction, furniture, and do-it-yourself markets, such as Home Depot and Lowe's. SSI has three facilities in California: Pleasanton, Stockton and Riverside. This Agreement (ET15-0330) was approved by the Panel in November 2014, for the Stockton facility.

SST has another active ETP Agreement (ET15-0326) that was approved by Delegation Order October 2014, in the amount of $25,200, for the Riverside facility. The Company requested a separate project for Riverside in order to better manage its recordkeeping and administration. The combined requested funding of these two active Agreements is $51,360.

AMENDMENT DETAILS

SSP is asking for a funding increase of $135,090 based on hours of training delivered to date, consistent with its original request for funding. That request was "right-sized" due to prior poor performance. The Company earned $51,923 from an amount approved of $80,910 (65%) under ETP Agreement (ET12-0150), where training took place at all three locations. In the prior Agreement, $26,160 in earnings was attributable to Stockton. On that basis, the subject Agreement was "right-sized" to $26,160 from an original request of $60,600.

At this point in time, SST has uploaded training hours in ETP Online Tracking sufficient to project performance of 100% for Job Number 1. The funding requested under this Amendment would enable the delivery of additional hours, in keeping with the original training plan. This includes training in Continuous Improvement and Manufacturing Skills. Three new courses will be added for training on new equipment: Strong Frame, Truss Plates, and Shear Brace Repair/Protect. This Amendment will allow SST to enroll more workers, and deliver additional hours for incumbent worker training in Job Number 1. If approved, this Amendment will have a prospective start date.

In addition, SST has uploaded training hours sufficient to earn 15% of funding allocated under Job Number 2 (Job Creation). The Company has already hired and trained four employees against its commitment of five, and expects to deliver additional hours, beyond the weighted average of 60. Retention will begin shortly, in support of the Company's projection of 100% earnings for Job Number 2.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by SST under this Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET15-0330	$26,160	11/17/2014-11/16/2016	270	0	0

The ETP Class/Lab Tracking System indicates 1,813 hours of reimbursable training for a potential earning of $21,120 (80% of the funding amount).

The following table summarizes performance by SST's Riverside facility:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET15-0326	$25,200	12/01/2014-11/30/2016	208	0	0

The ETP Class/Lab Tracking System indicates 1,400 hours of reimbursable training for a potential earnings of $25,200 (100% of the funding amount).

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0150	Pleasanton, Stockton, Riverside	9/16/2011–9/15/2013	$80,910	$51,923 (65%)

ET12-0150 - Three facilities participated in training (Pleasanton, Stockton and Riverside) which created logistical challenges to deliver training at multiple locations with only two certified facilitators. The leadership curriculum, which comprised the majority of the recorded hours in the contract, was all instructor-led training, and the number of internal trainers in the organization was limited.

This proposal will only include the Stockton facility. Representatives at the facility are confident in delivering and implementing training**.** Subject matter experts at the Stockton facility (35) will deliver the training.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Quality Concepts
- Process Improvement
- Just-in-Time Processes
- Teambuilding
- Problem Solving
- Quality Good Manufacturing Practices
- Focus Improvement
- Material Improvement
- Preventative Maintenance
- Organizational Capability Continuous Improvement
- Business Performance/Skills Enhancement
- Communication Skills
- Project Management
- Environmental Sustainability
- Systems, Applications and Products
- Best Practices
- Performance Management

MANUFACTURING SKILLS

- Total Productive Manufacturing
- Production Equipment Operation and Maintenance
- Autonomous Maintenance
- Operator Process/Equipment
- Lean Six Sigma
- Technician Processes
- Maintenance Processes
- Electrical & Electronic Equipment Operation, Maintenance and Repair
- Pneumatic Equipment Operation
- Electrical Systems Technology
- Warehouse Automation, Equipment and Processes
- New Presses training
- Shear Brace Production Line Training
- Automated Equipment Training
- **Strong Frame**
- **Truss Plates**
- **Shear Brace Repair and Protection**

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

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Tiger Lines, LLC

Agreement Number: ET15-0468

Panel Meeting of: June 26, 2015

ETP Regional Office: Sacramento **Analyst:** K. Smiley

PROJECT PROFILE

Contract Attributes:	Retrainee Seasonal HUA Priority	Industry Sector(s):	Services Transportation/Logistics Priority Industry: ☒ Yes ☐ No
Counties Served:	San Joaquin, Stanislaus	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 180	U.S.: 180	Worldwide: 180
Turnover Rate:	14%		
Managers/Supervisors: (% of total trainees)	8%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$150,480		$0	$0		$150,480

In-Kind Contribution:	100% of Total ETP Funding Required	$230,000

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	Business Skills, Commercial Skills, Cont. Imp., Computer Skills, Mnmgt. Skills	155	8-200	0	$810	$15.07
				Weighted Avg: 45			
2	Retrainee HUA Priority	Business Skills, Commercial Skills, Cont. Imp., Computer Skills	13	8-200	0	$810	$11.30
				Weighted Avg: 45			
3	Retrainee HUA Seasonal Priority	Business Skills, Commercial Skills	20	8-200	0	$720	*$11.30
				Weighted Avg: 40			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the 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: $15.07 per hour for San Joaquin and Stanislaus counties
Job Numbers 2 & 3 (HUA): $11.30 per hour for San Joaquin and Stanislaus counties.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☒ Maybe
Job Number 1 may use up to $1.90 per hour to meet the Post-Retention Wage; Job Number 2 may use up to $1.55 per hour to meet the Post-Retention Wage**.**

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Drivers		111
Managers		15
Clerical Staff		10
Mechanics		15
Dispatchers		4
Job Number 2		
Drivers		3
Clerical Staff		5
Mechanics		5
Job Number 3		
Seasonal Drivers		20

INTRODUCTION

Founded in 1935, Tiger Lines, LLC (Tiger Lines) (www.tigerlines.com) is a wholly-owned subsidiary of LTS Rentals, LLC, located in Lodi. Tiger Lines is a family-owned trucking company specializing in agricultural crop transportation. The Company moves many different types of freight including raw produce, recyclables and forest by-products. Tiger Lines also provides fleet services and logistics.

Training will be provided at both Company locations in Stockton and Atwater.

PROJECT DETAILS

According to the Company, there is a shortage of commercial drivers, such that they must hire newly licensed drivers with no experience. In response, Tiger Lines has developed a Driver Finishing School on defensive driving techniques, backing-up procedures and safety protocols. Tiger Lines is also hiring seasonal drivers for the agriculture season. All drivers will receive training in driver safety as well as customer service.

In addition, Tiger Lines plans to upgrade Clerical and Management skills with a customer-focused training plan. This training will help the Company secure more contracts while giving the trainees transferable business skills. The training will also include financial management training and advanced training in Microsoft Office. These courses will upgrade incumbent workers skill sets in software applications and office equipment.

Training Plan

Business Skills (30%): Training will be offered to all occupations to improve customer and business relations. Courses will include Business Communication, Behavior Style Strategies, Operational Skills and Strategic Planning. These courses will insure efficiency and customer satisfaction.

Commercial Skills (30%): Training will be offered to Drivers, Seasonal Drivers and Mechanics to improve safety and consistency. Courses will include Commercial Truck Repair, On-the-Road Skills, Tractor and Trailer Connecting and Pre-Trip/Post-Trip Inspections.

Management Skills (10%): Training will be offered to Managers to increase effective decision making and productivity. Courses will include Decision Making, Leadership Skills and Team building skills.

Computer Skills (10%): Training will be offered to Dispatchers, Clerical Staff, Mechanics and Managers to increase accuracy and knowledge of internal software programs. Courses will include Advanced Microsoft Office, Computer-Based Diagnostic Equipment, Management Reports and QuickBooks.

Continuous Improvement (20%): Training will be offered to all occupations to enhance communication and increase efficiency. Courses will include Meeting Management, Team Building and Decision Making.

Commitment to Training

Tiger Lines invests $115,000 per facility annually for training and includes sexual harassment prevention, labor laws, violence in the workplace and facility operations.

Tiger Lines 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

The 33 trainees in Job Numbers 2 & 3 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's locations in San Joaquin and Stanislaus counties qualify for HUA status under these standards.

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Tiger Lines requests a modification to $11.30 per hour.

Retention Modification

The 20 Seasonal Drivers (Job Number 3) also qualify for a modified retention period of no less than 500 hours within 12 months of the end-of-training. These workers work approximately six months out of the year. Tiger Lines requests this retention modification for Job Number 3.

Impact/Outcome

Tiger Lines' expectations for training are to improve efficiency and safety among incumbent workers. They are also expecting to increase customer satisfaction and management consistency.

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 $13,000.

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 Communication
- Business Fundamentals
- Business Performance
- Conflict Resolution
- Customer Relationship Management
- Customer Service
- Communication Styles
- Dealing with Difficult People
- Interpersonal Communications
- Leadership
- Logistical Operational skills
- Planning and Organization
- Project Management and Methodology
- Strategic Planning
- Time Management
- Strategic Logistics Planning
- Strategies for Dispatchers
- Communications Skills for dispatchers
- Leadership Skills for Dispatchers

COMPUTER SKILLS

- Management Reports
- Financial Management System
- Microsoft Office (Intermediate and Advanced only)
- QuickBooks
- Computer-Based Diagnostic Equipment

COMMERCIAL SKILLS

- Commercial Truck Repair
- Pre-Trip/Post-Trip Inspections
- On-the-Road Skills
- Off-Road Driving
- Differential Locking
- Tractor and Trailer Connecting
- Fifth Wheel Sliding and Tandem Sliding
- Coupling of Doubles
- Tight Turning and Backing Skills
- Dry Vans
- Live Floors
- Belt Trailers
- End Dumps
- Tanks
- Tomato Trailers (bulk tubs)

- Grape Trailers
- Basket Trailers
- Hoppers
- Flat Bed Doubles

CONTINUOUS IMPROVEMENT

- Cross-Training
- Creating a Quality Organization
- Change Management
- Decision Making
- How to Coach and Mentor
- Leadership Skills for Frontline Workers
- Meeting Management
- Process Improvement
- Problem Solving and Decision Making
- Strategic Planning
- Team Building

MANAGEMENT SKILLS (Managers Only)

- Effective Planning for New Managers
- Behavior Style Strategies (Managing Personalities)
- Coaching Procedures
- Essential Skills for the New Supervisor
- Employee Coaching
- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership Skills
- Motivation Skills
- Teambuilding Skills

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

Amendment Proposal #1 for:

Westech College

Agreement Number: ET15-0255

Panel Meeting of: June 26, 2015 **Effective Date:** June 26, 2015

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

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee SB<100 SET HUA	Industry Sector(s):	Engineering Technology/Other Manufacturing
Counties Served:	Los Angeles, Orange, Riverside, San Bernardino	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No	Priority Industry:	☒ Yes ☐ No

Current Contract Term: September 1, 2014 to August 30, 2016

Current Funding	In-Kind Contribution
$374,367	$380,000

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
+$350,200	+$24,265	$374,465	+$370,000

Total Funding
$748,832

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	Computer Skills	**80**	8-200	0	$1,925	$14.90
				Weighted Avg: 100			
2	Priority/Retrainee SET	Computer Skills	**40**	8-200	0	$1,925	$20.32
				Weighted Avg: 100			
3	Priority/Retrainee SB<100	Computer Skills	**100**	8-200	0	$2,780	$14.90
				Weighted Avg: 100			
4	Priority/Retrainee SB<100 SET	Computer Skills	**73**	8-200	0	$2,780	$20.32
				Weighted Avg: 100			
5	Retrainee	Computer Skills	**13**	8-200	0	$1,604	$14.90
				Weighted Avg: 100			
6	Retrainee SET	Computer Skills	**10**	8-200	0	$1,604	$27.09
				Weighted Avg: 100			

Minimum Wage by County: Job Numbers 1, 3, & 5: $16.04 per hour for Los Angeles County; $15.98 per hour for Orange County; and $14.90 per hour for Riverside & San Bernardino counties

Job Numbers 2 & 4 (SET/Priority Industry): $20.32 per hour

Job Number 6 (SET Statewide): $27.09 per hour

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

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

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

Wage Range by Occupation		
Occupation Title	Wage Range	Estimated # of Trainees
JOB NUMBERS 1-6		
Architect Assistant		16
Drafter		35
Engineering Assistant		35
Technician		49
CAD Designer		50
Machinist		45
CNC Programmer		26
Architect		30
Engineer		30

INTRODUCTION

Founded in 1988, Westech College (Westech) (www.westech.edu) is a private vocational institution headquartered in the city of Fontana. Westech provides training programs on the latest computer software utilized in the construction, architectural, manufacturing, and engineering industries.

Computer training includes Revit, AutoCAD, and SolidWorks. Westech provides training at its three locations in San Bernardino, Los Angeles, and Orange County. This will be the fifteenth contract between Westech and ETP.

AMENDMENT DETAILS

This proposal was originally presented before the August 22, 2014 Panel meeting for $749,055. In consideration of ETP Fiscal Year 2014/2015 funding constraints, the Panel asked Multiple Employer Contractors (MEC) with more than three months remaining in the term of their active Agreement, to return for consideration. The Agreement amount was reduced by 50%, and approved for $374,367.

Westech has continued to provide ETP training for the last nine months. Based the ETP Online Tracking System, Westech has delivered enough training hours to show performance of 81%. With a year remaining in the Agreement, Westech requests to restore the 50% cut in funding from the August 2014 Panel Meeting. Restored funding will allow the college to deliver training to more students without interrupting the semester schedule. The Agreement amount for this project will increase from $374,367 to $748,832 and the total number to train will increase from 165 to 316.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET15-0255	$374,367	09/01/14-08/30/16	144	66	66

ET15-0255: As of April 2015, Westech has enrolled 145 trainees. Of this amount, 66 trainees have completed training and the 90-day retention period. The ETP Online Tracking System shows 13,566 training hours earning approximately $305,108 (81% of the Agreement amount).

RETRAINEE - JOB CREATION

Training Proposal for:

Costa Mesa Healthcare, Inc. dba Newport Sub-Acute Healthcare Center

Agreement Number: ET15-0473

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Medical Skills Training Priority Rate Retrainee SET	Industry Sector(s):	Healthcare Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Orange	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 142	U.S.: 142	Worldwide: 142
Turnover Rate:	4%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$191,520		$0	$0		$191,520

In-Kind Contribution:	100% of Total ETP Funding Required	$239,729

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Medical Skills Training Priority Rate SET	Computer Skills, Cont. Imp., MS-Clinical w/Preceptor, MS-Didactic	60	8-200	0	$1,656	$20.55
				Weighted Avg: 92			
2	Job Creation Initiative Retrainee Medical Skills Training Priority Rate SET	Computer Skills, Cont. Imp., MS-Clinical w/Preceptor, MS-Didactic	36	8-200	0	$2,560	$13.35
				Weighted Avg: 128			

Minimum Wage by County: Job Number 1 (SET/Priority Industry): $20.55 per hour
Job Number 2 (SET/Job Creation): $13.35 per hour for Orange County.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $1.55 per hour may be used to meet the wage in Job Number 1; and up to $2.00 per hour may be used to meet the wage in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Licensed Vocational Nurse		25
Registered Nurse		17
Respiratory Therapist		14
Social Worker		4
Job Number 2		
Licensed Vocational Nurse		12
Registered Nurse		6
Respiratory Therapist		6
Social Worker		2
Certified Nurse Assistant		6
Registered Nurse Assistant		4

INTRODUCTION

Costa Mesa Healthcare, Inc. dba Newport Sub-Acute Healthcare Center (Newport or Center) (www.newportsubacute.com) is an assisted-living facility that specializes in providing skilled

nursing care and rehabilitation for the elderly. The Center is located in Costa Mesa, and this will be its first Agreement with ETP.

Newport is certified by Medicare, Medi-Cal, and numerous Health Maintenance Organization to provide nursing, medical and rehabilitation services, and social services. The Center also has programs for resident discharge, therapeutic recreation, dialysis, hospice, home healthcare and long-term care.

Newport faces many present-day healthcare challenges. This includes changes to the Affordable Care Act, reduced reimbursement level from Medicare/Medi-Cal, an increase in elderly patients, and new technology. At the same time, Newport has experienced a steady growth over the last two years and plans to hire approximately 36 additional new employees.

PROJECT DETAILS

Newport's strategic plan for 2015-2016 has been established to meet the changing needs of its patient population, new healthcare services, adding new employees, and keeping current with technological advances. In addition, Newport implemented a new Electronic Medical Record system, and Ventilator and Tracheotomy Care services. Newport also recently invested approximately $1 million dollars in facility improvements and new equipment including ventilator, suction equipment, concentrator and call light system. As such, the Center is incorporating new training methods, and best practices.

Newport's goal is to upgrade worker skills, stay competitive and improve efficiencies. Workers will gain experience, proficiency, effective communication skills and manage complex systems.

Training Plan

This proposal targets class/lab and Medical Skills training. Training is scheduled to begin upon Panel approval and will be delivered on-site by in-house staff.

Computer Skills (5%): Training will be offered to all occupations to utilize and update on Electronic Medical Record software to improve data tracking.

Continuous Improvement (15%): Training will be offered to all occupations to improve team building, medical care, medical record and documentation, customer service, standard operating procedures, communication skills, disciplinary skills, and quality improvement.

Medical Skills Training (80%): All trainees, except Social Worker, will participate in Clinical Preceptor and Didactic training, based on the complexity of their patient care responsibilities. Trainees will be focused on advance technical skills, use of new equipment and technology, and allow them to perform competently in various hospital units.

The rate of $22 per hour recognizes the higher cost of delivery for clinical training. It will apply to both the Didactic and Preceptor modes of delivery. The standard class/lab rate, $18 per hour for priority industries will apply to Computer Skills and Continuous Improvement training.

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.

As business growth and services expand, Newport has committed to hiring 36 new employees (Job Number 2). Newport will train these employees to accommodate business needs and its new services. Trainees will learn how to use equipment properly and enhance medical services to improve clinical outcomes, provide superior healthcare, utilize internal computer systems, and have a better understanding of Newport's business operation.

Newport 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.

Special Employment Training

Under Special Employment Training (SET), employers are not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

- Wage Modification

  Trainees in Job Number 1 employed in a Priority Industry qualify for a SET wage modification up to 25% below the statewide average hourly wage. The wage modification of $20.55 is requested for trainees in Job Number 1.

  All trainees in Job Number 2 qualify for the ETP New Hire minimum wage of $13.35 per hour for Orange County. There is no post-retention wage increase required for the Job Creation trainees in Job Number 2.

Commitment to Training

Newport provides new-hired orientation, skills updates, safety training, basic computer skills training, sexual harassment prevention, fire code, and in-service training. The Center reported that its current annual training budget is $40,000. Most training is delivered via class/lab with on-the-job and preceptor training is also provided.

ETP funding will help Newport overcome the financial pressures and allow the Center to deliver important skills training to its workforce.

Newport 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

  Newport has designated a Director of Nursing to oversee ETP training including all administrative responsibilities (enrollment, recording, and tracking training completed). The Center will also utilize a third party administrator for enrollment, data tracking, and invoicing (see Administration Services below).

<u>RECOMMENDATION</u>

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

National Training Systems, Inc. in Ladera Ranch assisted with development of this proposal for a flat fee of $14,740.

ADMINISTRATIVE SERVICES

National Training Systems, Inc. will also perform administrative services in connection with this proposal for a fee not to exceed 7% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

COMPUTER SKILLS

- Electronic Medical Records Application

CONTINUOUS IMPROVEMENT

- Administration
- Medical Records
- Customer Service
- Communication Skills
- Problem Analysis and Problem Solving
- Incident/Accident Management
- Resident Centered Care
- Mobility Skills
- Documentation
- Continuous Quality Improvement Workshop
- Culturally Appropriate Care
- Team Building

MEDICAL SKILLS TRAINING - DIDACTIC

- Restorative Nursing Program
- Annual Skills Update
- Infection Control
- Basic Life Support
- Body Mechanics
- Patient Transfer Techniques
- Equipment Skills (including pumps, vital monitoring devices, support systems, therapeutic modalities)
- Advanced Cardiac Life Support
- Change of Condition Management
- Pain Management (Acute and Chronic)
- Intravenous Therapy
- Enteral Feeding Tube Management
- Respiratory Care
- Wound Management
- Diabetic Management
- Urinary Management (foley catheter, input/output)
- Resident and Family Education
- Medication Administration Management
- Restraint and Restraint Reduction
- Behavior Management
- Psychotropic Medication Management
- Patient Assessment & Care
- End-of-Life Care
- Patient Fall Prevention
- Dementia/Alzheimer's
- Neurovascular System

- Residents with Special Needs
- Gastrointestinal System
- Laboratory:
  - Electrolyte Imbalance
  - Arterial Blood Gas Interpretation
- Cardiac Conditions
- Neurological Conditions
- Resident Emergency Response
- Skeletal/Orthopedic Conditions
- Incontinence Management (Colostomy Care, Urinary Catheter Care)

MEDICAL SKILLS TRAINING - CLINICAL PRECEPTOR

- Inpatient & Outpatient Care Unit:
  - Medication Management
  - Infection Control
  - Patient Safety
  - Clinical Skills Review
  - Patient Assessment and Care
  - Intravenous Therapy
  - Enteral Management:
    - Bolus
    - Intermittent
    - Continuous
  - Feeding Tube:
    - Insertion
    - Site Care
    - Removal
  - Dementia Care
  - Preventing and Identifying Complications Related to Tube Feedings
  - Respiratory Care
  - Wound Management
  - Dementia/Alzheimer's
  - Managing Patients with Neurovascular Conditions
  - Rehabilitation Services:
    - Physical Therapy
    - Occupational Therapy
    - Speech Therapy
  - Residents with Special Needs
  - Gastrointestinal Conditions
  - Cardiac Conditions
  - Skeletal/Orthopedic Conditions
  - Incontinence Management (Colostomy Care)
  - Assisting and Performing Self Care Skills with Patients; Facilitating Functional Gains of Patients
  - Functional Mobility and Ambulation
  - Bowel and Bladder Training of Patients
  - Identification of Skin Impairments and Prevention
  - Identification of Patient Change in Condition
  - Monitoring of Cardiovascular Changes Such as Vital Signs, Endurance, Level of Consciousness
  - Breathing Patterns and Respiratory Function
  - Pain Management

- Positioning of Patients for Correct Body Alignment
- Monitor Blood Pressure of Patients
- Operate Safety Devices with Patient
- Activities of Daily Living
- Conduct Range of Motion Exercises with Patient
- Patient Care of Foot and Hand
- Infection Control
- Charting
- Colostomy Care
- Hazardous Waste Handling
- Isolation Techniques
- Safe Patient Handling
- Use of the Call Light System
- Safe Linen Handling
- Equipment/Modalities
- Therapeutic Safety
- Proper Use of Exercise Equipment
- Therapeutic Activities
- Therapeutic Exercises
- Assistive Devices
- Procedures for Temperature check for Hydrocollator/Paraffin

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

Meggitt (North Hollywood), Inc.

WITHDRAWN

Retrainee – Job Creation Training Proposal for:

Quinn Group, Inc.

Agreement Number: ET15-0472

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET HUA Job Creation Initiative	Industry Sector(s):	Manufacturing Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles, Orange, Ventura, Kern, Tulare, Fresno, Santa Barbara, Monterey	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 1,100	U.S.: 1,100	Worldwide: 1,100
Turnover Rate:	6%		
Managers/Supervisors: (% of total trainees)	11%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$224,098		$0	$0		$224,098

In-Kind Contribution:	100% of Total ETP Funding Required	$231,600

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr., Mfg. Skills, PL-Mfg.	207	8-200	0	$864	$15.07
				Weighted Avg: 48			
2	Retrainee SET	Business Skills, Computer Skills, Continuous Impr., Mfg. Skills, PL-Mfg.	15	8-200	0	$600	$27.40
				Weighted Avg: 40			
3	Retrainee SET HUA	Business Skills, Computer Skills, Continuous Impr., Mfg. Skills, PL-Mfg.	30	8-200	0	$675	$15.07
				Weighted Avg: 45			
4	Retrainee Job Creation Initiative	Business Skills, Computer Skills, Continuous Impr., Mfg. Skills, PL-Mfg.	20	8-200	0	$800	$12.33
				Weighted Avg: 40			

Minimum Wage by County: Job Numbers 1 & 3: $15.97 per hour for Los Angeles County; $16.02 per hour for Orange County; and $15.07 per hour for Kern, Fresno, Monterey, Santa Barbara, Tulare and Ventura Counties. Job Number 2: $27.40 per hour for SET Statewide Average Hourly Wage. Job Number 4: $13.31 per hour for Los Angeles County; $13.35 per hour for Orange County; and $12.33 per hour for Kern, Fresno, Monterey, Santa Barbara, Tulare and Ventura Counties.

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

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

Up to $4.10 per hour may be used to meet the Post-Retention Wage for Job Numbers 1-4.

Job 1 Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		10
Coordinator		10
Driver		10
Sales Staff		10
Equipment Specialist		20
Support Staff		20
Technician		97
Manager/Supervisor		30

Job 2 Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		2
Coordinator		2
Driver		2
Sales Staff		2
Equipment Specialist		2
Support Staff		2
Technician		3

Job 3 Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		2
Coordinator		4
Driver		2
Sales Staff		2
Equipment Specialist		4
Support Staff		4
Technician		12

Job 4 Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		2
Coordinator		2
Driver		1
Sales Staff		1
Equipment Specialist		2
Support Staff		2
Technician		8
Manager/Supervisor		2

INTRODUCTION

This will be the fourth Agreement between ETP and Quinn Group, Inc. (Quinn) (www.quinncompany.com). The Company provides manufacturing, repair and rental services for heavy construction equipment, and specializes in component rebuild.

Quinn started as a farm implement dealer in 1919, providing agricultural, construction, and industrial equipment sales and services throughout California. The Company supplied Killefer Disk and Holt Tractors to Fresno-area farmers, which helped develop the San Joaquin Valley into a rich agricultural region. In 1925, Quinn became Caterpillar Tractor Company's (now Caterpillar Inc.) dealer in Fresno and Madera County. Since then, the Company has expanded through acquisitions and grown alongside the economy of California.

Headquartered in the City of Industry, Quinn is now in its third generation of family ownership with 24 California locations from Salinas to San Juan Capistrano. The Company is now an authorized facility for Caterpillar and Kent products, Stanley LaBounty hydraulic attachments, and provides construction equipment and machinery to commercial businesses and the U.S. government. Quinn's inventory includes asphalt, paving and concrete equipment; compaction equipment; crawler; loaders; dozers; excavators; motor graders; pipe layers; scrapers; and wheel loaders.

Quinn is also a component rebuilder and provider of other services such as re-manufacturing heavy equipment, equipment appraisals, financing and leasing and insurance, and transportation/hauling.

With current and emerging technological advances, America's heavy machinery marketplace is becoming more competitive in the global economy. To remain competitive and maintain its market share, Quinn recently constructed a 245,000 square foot re-manufacturing plant in the City of Industry at a cost in excess of $20 million. The new plant was outfitted with new equipment, and some used equipment was reinstalled to make the facility operational.

As part of the new construction, Quinn also built a new Dynamometer Testing Center used to test heavy equipment engines and transmissions. Equipment is brought into the facility, mounted on testing equipment, and then stress tested to confirm the components meet CAT Standards. Technicians monitor equipment performance from a computerized control center that tracks all aspects of engines and transmissions.

The addition of these capabilities will allow the Company to hire new employees and thus increase business. Business demands are creating the need to grow, resulting in increased sales, additional employees and more secure jobs. Quinn is requesting ETP funds to allow the Company to expand its training culture at its new plant and remote facilities. The Company will implement a training program that will improve production efficiencies, customer service, and sales.

PROJECT DETAILS

TRAINING PLAN

Manufacturing Skills (70%) - Training will be provided to Equipment Specialists, Technicians and Support Staff to learn skills that support the new facility and equipment. Workers that have specialized skill sets or have worked on a limited number of equipment components will be cross-trained to meet compliance and technical construction heavy equipment specifications.

Business Skills (10%) – Training will be provided to all trainees to improve customer service, communication skills, internal and external communications and teamwork; to sharpen negotiation skills; help resolve complaints and improve customer satisfaction' to increase sales.

Computer Skills (10%) – Training will be provided to Equipment Specialists, Technicians and Support Staff on internal software applications. All other trainees will be provided training in Advanced and Intermediate MS Office necessary to better utilize computer information to respond more quickly to customer needs resulting in more on-time deliveries and increased sales.

Continuous Improvement (10%) – All trainees will require training on the new re-manufacturing facility. The trainees will participate in Six Sigma Processes, Lean Manufacturing Skills, and other techniques to improve workflow, increase efficiency, and reduce downtime.

Productive Laboratory

PL in Manufacturing Skills will be offered to 40 Equipment Specialists, Technicians and Support Staff in the operation of proprietary equipment in the new re-manufacturing plant. This training is too costly to replicate in a simulated setting. Trainees will receive a combination of class/lab and PL-Manufacturing Skills training. The trainers are in-house subject matter experts who are exclusively dedicated to instruction.

Heavy construction equipment and the repair and re-manufacture of tools and machinery can only be accessed onsite in a large maintenance facility. Trainees will learn to diagnose and repair machinery by observation, shadowing the trainer, and completing supervised assignments. Each PL event is structured with specific skills that trainees must learn. Trainees are ultimately evaluated on knowledge, skill, productivity, proficiency, and safety. Instructors must certify competency before trainees are allowed to work independently. Trainers will be in-house staff and subject matter experts with at least two years of experience in specialized heavy construction equipment and repair.

Majority of the trainer-to-trainee ratio for PL training will be 1:1. Approximately 5% will have 1:3 ratio due to availability of specialized heavy construction equipment. Up to 40 PL hours will be provided to incumbent trainees during cross-training and to newly hired trainees, particularly those who have not previously worked in the same industry.

Retrainee - Job Creation

In support of 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 are subject to a lower post-retention wage.

To support the expansion of its new facility and fully utilize the new equipment, Quinn has committed to hiring 20 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.

High Unemployment Area

Some trainees from all Job Numbers work in High Unemployment Areas (HUA), with unemployment exceeding the state average by 15%. The Company’s locations in the cities of Lancaster, Salinas and the City of Industry; and in the counties of Tulare and Fresno are in an HUA.

- SET Wage Modification

  Quinn is requesting an HUA wage modification only for Job Number 3 trainees that work in an HUA. These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage.

Substantial Contribution

Quinn is a repeat contractor with payment earned in excess of $250,000 for all California facilities within the past five years. However, no single facility has earnings in excess of $250,000; therefore, the substantial contribution requirements do not apply.

Commitment to Training

Quinn spends approximately $620,400 a year for training at all California facilities for several classes such as OSHA-mandated safety regulations, sexual harassment prevention, new orientation and first aid training. Training is mandatory for all occupations company-wide and is presented using class/lab, computer-based, and on-the-job methods.

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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET13-0296	Statewide	03/01/13 – 02/28/15	$349,400	$224,814 (64%)
ET11-0169	Statewide	02/07/11 – 02/06/13	$220,500	$215,291 (98%)

ET13-0296: Quinn's new re-manufacturing facility, which is the focus of the training, was not completed when this contract started as originally planned. The new facility became fully operational in 2014, but there was not enough time in the contract term to complete all training. In addition, due to a late start, several trainees did not complete the required minimum 24 hours during the term resulting in a low completion rate.

To ensure the success in this new proposal, Quinn requested a much smaller funding amount and a more modest training plan. The strategy included submission of this proposal when the new facility is now fully operational and the installation and certification of all required production equipment have been completed. This new proposal has lower required minimum training hours per trainee which will concentrate on the most critical skill sets, allowing for more trainee participation and maximized results for this company.

DEVELOPMENT SERVICES

Quinn retained National Training Company (NTC) in Irvine to assist with development of this proposal for a flat fee of $15,000.

ADMINISTRATIVE SERVICES

NTC 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
- Advanced Operating Procedures
- 6 Sigma Processes
- Lean Manufacturing Skills
- Project Management Skills

COMPUTER SKILLS
- Accessing the Computerized Inventory
- Cat Product Link
- Dealer Business System
- Internal Software Applications
- MS Office (Intermediate and Advanced)
- Parts Delivery Software
- Project Management Software Skills
- Software Installation and Maintenance
- VisionLink

MANUFACTURING SKILLS
- CAT System Troubleshooting
- Circuit Devices
- Control Valve Maintenance
- Engine and Transmission Dynamometer Operation
- Engine Performance Test Procedures
- Failure Analysis Procedures
- Forklift Operation
- Hydraulic Equipment Operation
- Machine Electronic Problem Diagnosis
- Motor and Pump Inspection
- Operating Heavy Equipment Production Equipment
- Parts and Product Specifications
- Reading Schematics
- Standard Operating Specifications
- Transmission Service

BUSINESS SKILLS
- Communication Skills
- Customer Service Skills
- Handling Difficult People
- Putting the Customer First
- Working as a Team

Productive Lab Hours
0-40

PL - MANUFACTURING SKILLS (1:1 to 1:3 ratio)
- Air Brake Equipment
- Equipment Assembly Procedures

- Control Valve Equipment
- Electronic System Equipment
- Engine and Transmission Dynamometer Operation
- Engine Service Equipment
- Fork Lift Equipment
- Heavy Production Equipment
- Hydraulic Service Equipment
- Maintenance Equipment
- Motor and Pump Equipment
- Transmission Equipment

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 40 hours per-trainee.

RETRAINEE - JOB CREATION

Training Proposal for:

BAE Systems San Diego Ship Repair, Inc.

Agreement Number: ET16-0102

Panel Meeting of: June 26, 2015

ETP Regional Office: San Diego **Analyst:** K. Campion

PROJECT PROFILE

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

Number of Employees in:	CA: 5,423	U.S.: 40,000	Worldwide: 88,000
Turnover Rate:	9%		
Managers/Supervisors: (% of total trainees)	10%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$834,160		$0	$0		$834,160

In-Kind Contribution:	100% of Total ETP Funding Required	$1,138,022

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 Critical Proposal Priority Rate Job Creation Initiative	Mfg Skills, Continuous Impr, Business Skills, Computer Skills, OSHA 10/30, HazMat, HAZWOPER	200	8-200	0	$2,000	$13.28
				Weighted Avg: 100			
2	Retrainee Critical Proposal Priority Rate	Mfg Skills, Continuous Impr, Business Skills, Computer Skills, OSHA 10/30, HazMat, HAZWOPER	603	8-200	0	$720	$15.93
				Weighted Avg: 40			

Minimum Wage by County: Job Number 1 (Job Creation): $13.28 per hour for San Diego County; Job Number 2: $15.93 per hour for San Diego County.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1 - JOB CREATION RETRAINEES		
Production Worker		200
JOB NUMBER 2 - RETRAINEES		
Production Worker		442
Administrative/Professional Staff		81
Supervisor/Manager		80

Critical Proposal

This proposal for BAE Systems San Diego Ship Repair, Inc. (BAE-SDSR) is designated as a "Critical Proposal," as defined in Title 22, California Code of Regulations (CCR) 4402.2, by the Governor's Office of Business and Economic Development (Go-BIZ). BAE-SDSR is expanding its workforce due to the expansion of its shipyard and significant increases in its work capacity. This project will assist BAE-SDSR employees with development of job skills. It will be funded in FY 2015/16 consistent with the new caps.

INTRODUCTION

Located on San Diego Bay, BAE-SDSR repairs and refurbishes marine vessels for government and commercial customers (www.baesystems.com). The majority of shipyard work at BAE-SDSR center on the U.S. Navy fleet, Navy destroyers, Military Sea Lift Command landing platform docks, and dock landing ships. It also has commercial customers including cruise ships, tankers, and barges. BAE-SDSR's ship-repair capabilities include structural and piping modifications, machinery repairs and alterations, combat systems and electronics upgrades, ship conversions, and modernizations. The Company employs 1,600 full-time workers at its shipyard in San Diego, the site of the proposed training.

PROJECT DETAILS

The US Navy recently began implementing its "Pacific Pivot" strategy, planning to move 60% of its fleet and assets to patrols in the Pacific. The Navy has begun to boost the number of warships home-ported in San Diego from 60 to 79. In order to increase its capacity to dock more Navy ships, BAE-SDSR must increase its footprint in San Diego Bay. To do that, the Company has constructed a new 415 foot pier that was completed March 2015. This pier is projected to increase the Company's overall production capacity by 25%.

Additionally, BAE-SDSR purchased a new floating dry dock (one of the largest in the nation at 950 feet) which will be towed into San Diego Bay in mid-2016. This $100 million expenditure will almost double the Company's production capacity to repair larger ships and will allow BAE-SDSR the flexibility to work on many new types/classes of ships. (Currently, BAE-SDSR can only dock 3 of the 7 classes of Navy Ships. With the new dry dock it will be able to dock 6 of the 7 classes of Navy Ships.) Further, the new dry dock will allow BAE-SDSR the capacity to repair larger commercial vessels, such as cruise ships, a market that was previously unreachable. BAE-SDSR's business expansion coupled with the current and forthcoming challenges associated with repairing new classes of ships requires critical new training for its workforce in new ship systems and technologies.

Retrainee - Job Creation

In support of Job Creation, the Panel is offering incentives to companies that commit to hiring new employees (higher reimbursement rate and a lower post-retention wage). Trainees must be hired within the three-month period prior to Panel approval or during term of contract.

BAE-SDSR is expanding its footprint in San Diego Bay and increasing its work capacity 25 – 50% over the next two years. Consequently, the Company is currently in a critical hiring mode. Its strategic hiring plan calls for the addition of 250 – 300 production workers on payroll by the end of 2015, and an additional 200 to be hired in 2016, for a total of 500 full-time workers hired over the next two years. Of the 500 projected employees, 200 are included in this proposal (Job Number 1).

Training Plan

This will be BAE-SDSR's fifth Agreement. In this proposed Agreement, the majority of training topics are in new materials, new technologies, and new manufacturing processes specifically related to new classes of ships. A few training courses from the prior ETP Agreement will be offered again in this proposed Agreement, but only for newly hired job creation trainees or incumbent workers who were not trained in the prior Agreement. There will be no duplication of training delivered in prior contracts for the same trainees.

In the prior ETP Agreement (ET14-0190), BAE-SDSR needed training to comply with new stringent quality and safety requirements imposed by the U.S. Navy for the modernization of its vessels. Additionally, the Company needed to train Job Creation workers in manufacturing and welding skills. This proposal will focus on critical and immediate training to prepare workers for the repair and refurbishment of new classes of ships, new ship systems, and new technologies and to provide necessary skills to supervisors and managers to lead the changes at the organization. Newly-hired workers must immediately receive critical training in shipyard processes, procedures and technical work. Incumbent Production Workers (Job Number 2) need to become proficient in advanced manufacturing processes and need new skills to be able to effectively repair new and different classes of ships. All training will be delivered via class/lab and is scheduled to commence in mid-July 2015 in the following:

Manufacturing Skills (55%) – Training will be provided to Production Workers. Trainees must learn new production processes to understand shipboard terminologies and item specifications found in different classes of ships. Some workers will be trained in Advanced Manufacturing topics such as Ship Navigation Systems; Wireless Technologies, and Advanced Welding techniques. Others will be trained in Rigging, Welding and Structural Shipfitting with the goal to move trainees to a higher level in the areas of production quality control and workmanship.

Continuous Improvement (20%) – Training will be provided to all occupations to meet new job set-up requirements and work process controls for different ship classes. Trainees will learn how to streamline processes in work teams and learn Lean Six Sigma skills, root-cause analysis, and critical-thinking skills. Additionally, with an expanding workforce, the Company must train more Supervisors and Managers, the majority of whom will be promoted from within.

Business Skills (5%) – Training will be provided to selected Administrative/Professional Staff and Supervisor/Managers based on job functions. These courses are designed to effectively support production workers by providing skills to ensure work estimates and projects are written and managed. Training will also provide critical finance and accounting skills.

Computer Skills (5%) – Training will be provided primarily to Administrative/Professional Staff and Supervisor/Managers, but will also include select Production Workers based on job functions. Trainees will receive Enterprise Resource Planning skills to effectively navigate the Company's Information Management systems. Some will also receive financial software skills.

Hazardous Materials Handling (5%) – Training will be provided to Production Workers and Supervisor/Managers who handle hazardous waste. This training is designed to ensure newly-hired and incumbent workers have the skills to work in a shipyard hazardous environment.

Certified Safety Training

<u>OSHA 10/30</u>. (5%) This training will be provided to Production Workers and selected Supervisor/Managers. OSHA 10/30 is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

<u>Hazardous Waste Operations and Emergency Response Standard (HAZWOPER)</u>. (5%) This training will be provided to selected Production Workers and Supervisor/Managers. It is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom training, for workers stationed at the hazard site; and 24 hours for workers

who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Substantial Contribution (Critical Proposal)

BAE-SDSR is a repeat contractor with payment earned in excess of $250,000 and had a former Substantial Contribution imposed at the 15% level, at the San Diego facility, within the past five years. Critical Proposal regulations state that the Panel may modify the Substantial Contribution requirement when "a California business proposes to expand an existing facility by adding and training new employees for a new product line or business function." (Title 22, California Code of Regulations (CCR), Section 4402.2(b)(1).)

BAE-SDSR requests and Staff recommends that the Panel waive the Substantial Contribution requirement (currently the Substantial Contribution would be 30% totaling $130,248) for Job Number 2 incumbent workers, in accordance with Critical Proposal regulations based on project details above. (Job Number 1 is Job Creation and is not subject to Substantial Contribution.) Waiving the Substantial Contribution will allow the Company to concentrate more funds towards expansion. It will also assist the Company in meeting its hiring and training goals, enhancing the skills sets of its Production Workers, and assisting the Company in effectively increasing work capacity at the shipyard.

Commitment to Training

The Company's current training budget is approximately $1.2 million annually for its workforce in courses such as new employee orientation, benefits training, fire-watch, forklift certification, harness certification, ethics, heavy metal abatement, First Responder, crane safety, confined space, asbestos removal, aerial lift, Lockout/Tagout, and welding certifications. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

BAE-SDSR has a dedicated Training Manager and Training Administrator to schedule and oversee all company-wide training. ETP project administration will be provided by a subcontractor.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by BAE-SDSR under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET14-0190	$286,670	10/28/2013–10/27/2015	362	289	219

BAE-SDSR completed training on 2/13/2015. Based on the ETP tracking system, 19,747 reimbursable hours have been tracked (100% of the Agreement amount). The Contractor projects 100% earnings when the closeout invoice is processed by ETP.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET11-0105	San Diego	3/07/2011–2/06/2013	$249,480	$87,660 (35%)

ET11-0105 – BAE-SDSR reports two reasons for not meeting its ETP funding performance goals in this Agreement. First, the Company's in-house Training Administrator, responsible for the day-to-day operation of the ETP project, left the Company. The lack of oversight and knowledge of the ETP administrative processes caused training schedules to slip and the processing of ETP attendance rosters to be delayed. Consequently, the lack of project management resulted in lower than expected training numbers.

Secondly, during the term of the Agreement, BAE-SDSR shifted its training focus from Manufacturing Skills to Literacy Skills to ensure that all workers could communicate (read and speak) in basic English and follow printed ship-board signs. The Company provided over 10,000 hours of Literacy Skills training, but only received reimbursement for a portion of that amount due to ETP's Literacy Skills limitation of 45% of a trainee's total job skills training. Due to the time, effort and resources allocated to Literacy Skills, the Company was unable to complete the planned Manufacturing Skills training, resulting in fewer earnings than planned.

Corrective Actions Taken: 1) The incumbent worker funding amount (Job Number 2) for the subsequent ET14-0190 project was right-sized in to the dollar amount of ET11-0105; and 2) the Company brought in more oversight of the project with the help of the General Manager, Training Administrator and a third-party project administrator. These changes were in effect for ET14-0190 and were directly responsible for good performance for this Agreement.

DEVELOPMENT SERVICES

BAE-SDSR retained Bright Training Solutions (BTS) in San Diego to assist with development of this proposal for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

The Company also retained BTS to perform administrative services in connection with this proposal for an amount not to exceed 6% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8–200

Trainees may receive any of the following:

MANUFACTURING SKILLS

- Ships Navigation Systems
- New Technologies Supporting Large Ship Classes
- Fluid Systems
- Wireless Technologies
- Work Item Interpretation
- Machining Alignment Techniques
- Rigging
- Welding – Levels I through V
- Pipe Fitting/ Pipe Bending
- Visual Inspection Techniques
- Blueprint
- Navy Standard Items
- Structural Shipfitting
- Structural Burning
- Volumetric Testing
- Burntable Programming
- Material Identification
- Wave Guide Testing
- Connector/Fiber Optic Training

CONTINUOUS IMPROVEMENT

- Root Cause Analysis
- Critical Thinking
- Lean Six Sigma
- Advanced Communication Skills
- Leadership Skills for Managers and Non-Managers
- Motivational Skills
- Team Skills
- Expanded Process Control Procedures (EPCP)
- Work Certification Processes (WCP)
- Time Management
- Leading Change
- Managing Conflict
- Project Management Skills

BUSINESS SKILLS

- Business Writing Skills
- Finance Skills
- Assessing Risk
- Accounting Skills
- Contracts Management
- Information Technologies Management
- Purchasing Processes and Procedures
- Estimating Skills
- System Reporting Skills
- Inspection Deficiency Reporting

COMPUTER SKILLS

- Financial Software
- Enterprise Resource Planning Skills/Information Management System (IMS)
- Advanced Microsoft Office Skills

OSHA 10/30 (OSHA Certified Instructor)

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

HAZARDOUS MATERIALS

- Ship and Shop Safety
- Hazardous Materials

HAZWOPER (OSHA Certified Instructor)

- HAZWOPER

Safety Training cannot exceed 10% of total training hours per-trainee, with the exception of OSHA 10/30 and HAZWOPER.

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:

Rambus Inc.

Agreement Number: ET15-0469

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Services Technology/IT Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	San Francisco and Santa Clara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 318	U.S.: 388	Worldwide: 509
Turnover Rate:	8%		
Managers/Supervisors: (% of total trainees)	13%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$177,480		$0	$0		$177,480

In-Kind Contribution:	100% of Total ETP Funding Required	$237,600

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Mgmt. Skills	222	8-200	0-23	$540	$30.25
				Weighted Avg: 30			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Computer Skills	36	8-200	0-23	$1,600	$63.00
				Weighted Avg: 80			

Minimum Wage by County: $16.44 for San Francisco and Santa Clara counties.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Accounting/Finance Staff		10
Administrative Staff		11
Engineer I		91
Engineer II		19
HR Staff		6
IT Staff		40
Manager/Supervisor I		15
Manager/Supervisor II		14
Marketing Staff		6
Paralegal		4
Sales Staff		3
Supply Chain/Procurement Staff		3
Job Number 2 (Job Creation)		
Engineer		36

INTRODUCTION

Founded in 1990, Rambus Inc. is an Intellectual Property (IP) company. Their business model is to discover and patent new and faster ways to communicate in the semiconductor world and license their IP to companies that fabricate semiconductor chips. The IP Rambus created is used in products such as Supercomputers, Sony's PlayStation gaming systems, high definition TV's and DLP video projectors, network routers, hard disc drive connections, and computer memory. In recent years, Rambus has also expanded into developing products and services in adjacent markets such as advanced LED lighting with R&D and Manufacturing.

Some of the initiatives Rambus is currently developing for clients include memory systems for the next generation of smartphones and tablets, advanced security solutions for cloud computing, and advanced new energy-saving LED lighting products.

PROJECT DETAILS

For Rambus to stay current with fast-paced changing technologies and remain competitive, it must train to upgrade, enhance, and expand their skillsets to shorten cycle times, increase capacity, increase quality, and reduce costs. Internal controls and skills are necessary to form a strong business and leadership core for future growth of the Company.

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.

Rambus has committed to hiring 36 new employees (Job Number 2). The date-of-hire for these employees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

Rambus is expanding existing business capacity by adding newly-hired employees to an existing function based on sales and revenue forecast. The Company does not plan to expand existing facilities as it currently has unused space to accommodate the new employees.

Training Plan

Business Skills (40%): Training will be offered to all occupations. Training in communication, team problem solving, presentation, and sales will help build good working relationships amongst employees, suppliers and customers. Training will improve and make consistent every aspect of the business. Business Skills training will be offered via Class/Lab and CBT.

Computer Skills (20%): Training will be offered to all occupations. Courses include CAD, integrated circuit manage software, and advanced Microsoft Office products. Training will increase employees’ proficiency in the use of various IT business software solutions and design systems for technology development purposes. Computer Skills training will be provided via Class/Lab and CBT.

Management Skills (40%): Managers/Supervisors will receive training in coaching, managing teams, change management, and advanced management skills to help drive the internal functionality of the organization.

Commitment to Training

The Company's annual training expenditure is approximately $15,000 per facility. Past training includes new-hire orientation, anti-sexual harassment, internet navigation, and basic computer skills.

Rambus 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 Rambus' HR team will oversee and coordinate the training program. An administrative subcontractor will also assist with administrative processes.

LMS

Rambus will utilize a Learning Management System (LMS) to track training. The LMS has been reviewed and approved by ETP staff for documentation of all training.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

ADP in San Dimas assisted with development of this proposal for a flat fee of $7,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Aligning Development Goals
- Business Writing
- Change Management
- Communication Skills
- Conflict Resolution Skills
- Consultative Approaches
- Decision Making
- Executive Presence and Presentation Skills
- Finance for Non-Finance Professionals
- Improving Team Effectiveness
- Leadership Skills
- Managing Priorities
- Negotiation Skills
- Professional Development
  - Accountability
  - Emotional Intelligence
  - Influencing
  - Managing Conflict
  - Managing Cultural Differences
  - Managing Difficult Conversations
- Sales Product Training
- Strategic Planning and Budget
- Team Problem Solving
- Transitions

COMPUTER SKILLS

- CAD
- Integrated Circuit Manage Software

MANAGEMENT SKILLS (for managers/supervisors only)

- Advanced Management Skills
- Building Employee Engagement
- Business Unit Specific Organization Development
- Coaching and Mentoring
- Keeping Talent
- Managing Across Global Locations and Cultures
- Managing Virtual Teams
- Rambus Management Program
  - Accountability
  - Change Management
  - Decision Making
  - Delegation
  - Giving Feedback
  - Influencing
  - Managing Conflict

CBT Hours

0 – 23

BUSINESS SKILLS

- How to Effectively Communicate Goals and Expectations (1 hour)
- How to Motivate Employees (1 hour)
- Meeting Management (1 hour)
- Networking (2 hours)
- Project Management (4 hours)
- Security Training (1 hour)
- Time Management (1 hour)

COMPUTER SKILLS

- Advanced Microsoft Excel (2 hours)
- Advanced Microsoft PowerPoint (2 hours)
- Advanced Microsoft Visio (2 hours)
- Advanced Microsoft Word (2 hours)
- MS Project (4 hours)

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

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

SavaSeniorCare Administrative Services, LLC

Agreement Number: ET15-0457

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	Medical Skills Training Priority Rate Retrainee SET	Industry Sector(s):	Healthcare Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Alameda, Contra Costa, Los Angeles, Orange, Sacramento, and Santa Clara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 670	U.S.:16,325	Worldwide: 16,325
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$422,928		$0	$0		$422,928

In-Kind Contribution:	100% of Total ETP Funding Required	$563,850

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Medical Skills Training Priority Rate SET	MS Didactic, MS Preceptor, Computer Skills, Continuous Impr	356	8-200	0-7	$1,188	$20.72
				Weighted Avg: 66			

Minimum Wage by County: SET/Priority Industry - $20.55 per hour.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe
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
Registered Nurse (RN)		101
Licensed Vocational Nurse (LVN)		129
Administration Staff		36
Therapists		90

INTRODUCTION

SavaSeniorCare operates nursing and assisted living facilities that provide long-term and short-term care. Through facilities located in Carmichael, Newport Beach, Oakland, Pittsburg, San Jose, and Tarzana, the Company provides skilled nursing care including physical, occupational and speech therapies; wound care; hospice care; rehab; and Alzheimer and Dementia services. Additionally, SavaSeniorCare Administrative Services, LLC (SavaSeniorCare) provides comprehensive back office services such as accounting, payroll, compliance, tax, centralized billing, information technology, benefits, worker's compensation, performance analytics, and purchasing. SSC will be the lead employer and contract holder to coordinate the implementation and administration of training; however, it is not included in the proposed training plan. All participating facilities, including SSC, are owned by Holdco, LLC, the parent company.

PROJECT DETAILS

SavaSeniorCare anticipates an influx of residents and patients in the near future due to an aging workforce population. This influx, coupled with more medically complex cases and acuity levels that are expected to increase upon completion of the Affordable Care Act, will dictate changes to care demands and delivery (changes to systems including Electronic Medical Records and ICD-10 and changes to policies including unplanned hospital discharge/re-hospitalization, quality improvement, and Dementia (Life Engagement) Initiative).

Training Plan

ETP-funded training will support SavaSeniorCare's goals of maintaining a skilled workforce to improve patient care and efficient use of various software and electronic medical records.

Computer Skills (10%) - Training will be offered to all occupations in Electronic Medical Records software to accurately enter and retrieve patient information. In addition, intermediate and advanced Microsoft Office training will improve the accuracy and reporting of daily activities.

Continuous Improvement (20%) - Training will be offered to all occupations to improve team building, culturally appropriate care, documentation, customer service, communication skills, and quality improvement.

Medical Skills Training (70%)

Training will focus on communication with doctors and other health professionals, medication administration, pain management, medical diagnosis, respiratory care, therapy, and infection prevention and control.

Computer-Based Training (**CBT**)

Some of the Medical Skills-Didactic training may be delivered via CBT.

Commitment to Training

SavaSeniorCare's annual training expenditure is approximately $10,000 per facility. Past training includes new-hire orientation, compliance training, safety training, and some annual skills update training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

SavaSeniorCare will oversee the training program with assistance from the administrative subcontractor. In addition, each facility will have a designated staff member to coordinate the training and be responsible for submitting training data to the administrative subcontractor for data entry into the ETP systems.

LMS

SavaSeniorCare will utilize a Learning Management System (LMS) to track training. The LMS has been reviewed and approved by ETP staff for documentation of all training.

Special Employment Training

Under SET, an employer is not required to demonstrate out-of-state competition. Trainees must earn at least the Statewide Average Hourly Wage at the end of the retention period. However, for trainees employed in a priority industry, the Panel may modify the SET wage up to 25% below the statewide average hourly wage. SavaSeniorCare is requesting this wage modification to $20.72, a 24% adjustment.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

SavaSeniorCare retained ADP in San Dimas, CA to assist with development of this proposal for a flat fee of $15,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

MEDICAL SKILLS TRAINING - DIDACTIC

- Allergies
- Bloodborne Pathogens
- Change in Condition
- Change of Condition Management
- Dementia Care Level III
  - Demential Care Specialist Training
  - Alzheimer's Disease and Related Disorders
- Diabetic Management
- Dignity
- Enteral Management
- Hydration
- Infection Control
- Interdisciplinary Team Process
- Intravenous Therapy
- Medical Diagnosis
- Medical Direction in Long-Term Care
- Medication Administration Management
- Pain Management (Acute and Chronic)
- Preventive Skin Care Measures
- Resident and Family Education
- Respiratory Care
- Restorative Nursing Program
- Restraint and Restraint Reduction
- Safe Transfer
- Understanding Abuse & Neglect
- Urinary Management
- Wandering & Elopement
- Weights, Vitals, Immunizations
- Wound Management

MEDICAL SKILLS TRAINING – CLINICAL WITH PRECEPTOR

- Behavior Management
- Cardiac Conditions
- End of Life Care
- Gastrointestinal System
- Incontinence Management
- Laboratory
- Neurological Conditions
- Neurovascular System
- Patient Assessment & Care
- Patient Fall Prevention
- Physical, Occupational, Speech Therapy
- Psychotropic Medication Management
- Resident Emergency Response

- Residents with Special Needs
- Skeletal/Orthopedic Conditions

COMPUTER SKILLS

- Electronic Medical Records Application Skills
- Electronic Tablet for Bedside Charting
- Office/Excel/Word/PowerPoint (Intermediate and Advanced)
- Patient Services Billing Software

CONTINUOUS IMPROVEMENT

- Administration
- Assessments & Structured Progress Notes
- Billing Accuracy Process
- Care Plans & Care Plan Review
- Clinical Services System Management
- Communication Skills
- Create Progress Notes from a Care Plan or Task
- Customer Service
- Documentation
- Incident/Accident Management
- Interdepartmental Collaboration
- Interdisciplinary Team
- Medical Records
- Orders
- Point of Care
- Problem Analysis and Problem Solving
- Quality Assurance/Performance Improvement (QAPI)
- Quick Start
- Resident Centered Care
- Skill Competency Clinical and Non-Clinical Staff
- Team Building

CBT Hours

0–7

MEDICAL SKILLS - DIDACTIC

- Behavior Management – 1 Hour
- Bloodborne Pathogens – 1 Hour
- Change in Condition – 1 Hour
- Medication Administration Management – 1 Hour
- Preventive Skin Care Measures – 1 Hour
- Restraint and Restraint Reduction – 1Hour
- Urinary Management – 1 Hour

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.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

RETRAINEE – JOB CREATION

Training Proposal for:

ICON Aircraft, Inc.

Agreement Number: ET15-0465

Panel Meeting of: June 26, 2015

ETP Regional Office: Sacramento **Analyst:** W. Sabah

PROJECT PROFILE

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

Number of Employees in:	CA: 95	U.S.: 95	Worldwide: 95
Turnover Rate:	4%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$315,540		$0	$0		$315,540

In-Kind Contribution:	100% of Total ETP Funding Required	$288,900

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	25	8-200	0	$900	$15.07
				Weighted Avg: 45			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	222	8-200	0	$1,320	$13.75
				Weighted Avg: 60			

Minimum Wage by County: Job Number 1: $15.07 per hour for Solano County
Job Number 2(Job Creation): $12.33 per hour for Solano County.

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

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

Up to $1.32 per hour may be used to meet the Post-Retention Wage for Job Number 1 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2		
Composite Manufacturing Technician		4
Composite Structural Entry-Level Staff (Job No.2)		30
Composite Structural Mid-Level Staff (Job No.2)		21
Composite Structural Senior-Level Staff (Job No.2)		7
Aviation R&D Technician		6
Facility Technician		2
Engineering Document Control Clerk		2
Materials and Planning Staff		15
Paint & Assembly Technician		97
Paint & Assembly Painter		5
Paint & Assembly Painter (Job No.2)		46
Purchasing Buyer		2
Purchasing Buyer (Job No. 2)		1
Quality Inspector		2
Quality Inspector (Job No. 2)		7

Critical Proposal

This proposal for ICON Aircraft, Inc. (ICON Aircraft) is designated a "Critical Proposal", as defined in Title 22, California Code of Regulations (CCR) 4402.2, by the Governor's Office of Business and Economic Development (Go-BIZ). ICON Aircraft is expanding within California through the addition of new jobs as a result of a new facility in Vacaville. This project will assist ICON Aircraft to develop new job skills for incumbent workers and newly-hired workers.

INTRODUCTION

Founded in 2006 and headquartered in Los Angeles, ICON (http://www.iconaircraft.com) is a designer, developer, and manufacturer of light sports aircraft. The Company's current manufacturing and paint operations are in Tehachapi. In 2004, the Federal Aviation Administration created the Light Sport Aircraft for lightweight, simple and easy-to-fly recreational aircraft, which are considered safe, affordable and more accessible than traditional transportation category aircraft. This regulatory change allowed ICON Aircraft to become one of the premier producers of the new class of consumer-focused sport airplanes. In addition to manufacturing aircrafts, ICON Aircraft provides routine maintenance services to their customers. The Company's customers primarily include individuals that like to fly recreationally.

Need for Training

ICON Aircraft leased a new 140,000 square feet facility in Vacaville to house all its engineering, design and manufacturing operations. The Vacaville facility upgrades are currently in process, and the Company anticipates moving all employees from their Tehachapi facility to the Vacaville facility mid-2015. With the expansion of a new facility, staff will be required to improve products and efficiency specifically in manufacturing, quality and support functions. The Company currently has 1,271 sports aircrafts on order with the first production fuselage currently in production at the Tehachapi facility. Production will be completed at the Vacaville facility once all new equipment has been installed.

The Company will run a multi-shift operation to sequence the build of their products to supply customers with aircrafts within the scheduled delivery dates. Both seasoned and new employees will be reallocated evenly to all shifts to support production at all level and improve efficiency. This will require cross-training among all employees to become more versatile, reduce production time and successfully implement Lean Manufacturing Principles. In addition, continuous improvement training will empower employees, encourage open communication and allow employees to quickly identify and resolve issues.

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.

ICON Aircraft has committed to hiring 222 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.

All newly hired staff will be for ICON Aircraft's new facility in Vacaville. The new facility will house all engineering, design and manufacturing operations which subsequently will require the additional employees. The Company has begun hiring in the Vacaville and Sacramento area to

increase production and meet customer needs. ICON Aircraft also represents that these trainees will be hired into “net new jobs” as a condition of contract.

PROJECT DETAILS

Training Plan

ICON Aircraft will provide 8-200 hours of Class/lab training and up to 60 hours of Productive Lab (PL) training. This proposal will have a “blended’ reimbursement rate for Retrainees and Job Creation employees. Retrainees will be reimbursed at a blended rate of $20 per hour and Job Creation employees will be reimbursed at a blended rate of $22.

Business Skills (20%): Training will be offered to all occupations except Aviation R&D Technicians. Training will focus on Product Knowledge and Project Management to manage workload, accurately identify product problems and resolve issues quickly. Technicians will receive training in inventory control and communication to improve workflow processes and increase effective communication within staff.

Computer Skills (10%): Training will be offered to Engineering Document Control Clerks in ERP PLEX System, Graphics, Programming, Publishing, Database Management, and other related applications. ETP PLEX system training will allow trainees to use the configuration management for the Bill of Materials to improve engineering drawings, material usage requirements, purchasing, and production planning. The Company also has a MRP system that will allow employees to design and manufacture new customized products and services efficiently.

Continuous Improvement (25%): Training will be offered to Composite Manufacturing Technicians, Composite Structural Entry-Level Staff, Composite Structural Mid-Level Staff, Composite Structural Senior-Level Staff, Engineering Document Control Clerks, Paint and Assembly Technicians, Paint and Assembly Painters and Quality Inspectors. The Company has determined that a formal continuous training program is critical to its success. Training will focus on Lean Manufacturing, Root Cause Analysis and Total Quality Management to reduce costs and improve product quality to meet the evolving needs of customers.

Hazardous Materials (10%): Training will be offered to Paint and Assembly Technicians and Paint and Assembly Painters to correctly handle and dispose explosive materials. Training course topic will include Explosive Materials Handling and Disposal.

Manufacturing Skills (35%): Training will be offered to Composite Manufacturing Technicians, Composite Structural Entry Level-Staff, Composite Structural Mid-Level Staff, Composite Structural Senior-Level Staff, Paint and Assembly Technicians, Paint and Assembly Painters and Quality Inspectors. Workers will be trained in manufacturing equipment and processes to make aircraft including PLC, common measurement tools, manual assembly tooling and inspection techniques. In addition, Paint and Assembly Technicians and Painters will be trained on paint booth controls, proper spraying techniques and material bonding requirements to ensure a safe working environment.

Productive Laboratory

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

PL-Manufacturing training will be offered to Composite Manufacturing Technicians, Paint and Assembly Technicians, Paint and Assembly Painters and Quality Inspectors. PL training will supplement Class/Lab training to strengthen employees understanding of how to verify special process techniques on parts and components for final completion of aircrafts. Trainees will also receive hands-on training in painting, sanding and bonding application to prevent equipment damage and injuries to themselves. Equipment will include Hand Sanders, Hand Paint Guns, and Non-Destructing Testing equipment and processes.

PL trainers will be subject matter experts that provide demonstration of the process prior to observing the trainee perform the task. ICON Aircraft will use in-house trainers to observe the trainees to ensure no defect or errors are made. The trainer will provide coaching and mentoring until the trainee has been determined competent in the process. During PL training, production is expected to decrease, as the trainees will be working with new equipment and required to meet established quality standards. The trainer-to-trainee ratio for PL training will not exceed 1:3. The 1:3 PL ratio will allow ICON Aircraft to train the maximum number of new hires at one time to meet the demands of customer orders while insuring aircraft quality is maintained during all phases of manufacturing and inspection processes. In addition, the 1:3 ratio will be more efficient and feasible for the Company as they train new hires.

Temporary to Permanent Hiring

The trainees in Job Number 2 come under Panel guidelines for “temporary to permanent” employment. ICON Aircraft 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. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by ICON Aircraft. Until then, ICON Aircraft will not receive progress payments.

Commitment to Training

ICON Aircraft has an annual training budget of $1,000. The Company did not have a formal training plan previously and all training has been on-the-job training on specific pieces of equipment. ETP funds will allow the Company to implement a formal training plan at their Vacaville facility.

ICON Aircraft 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

  Training is scheduled to begin July 2015. ICON Aircraft has identified a full time Human Resources employee in Vacaville to implement and administer this project.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

The Corporation for Manufacturing Excellence assisted with development of this proposal. [Note: California Manufacturing Technology Consulting is eligible to receive 10% of the

approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000].

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Budget Analysis
- Business Plans
- Business Strategies
- Communication Skills
- Computer/Internet Applications in Business
- Customer Service
- ERP - PLEX
- Inventory Control
- Listening Skills
- Materials Management
- Multi-Cultural Awareness
- Negotiating Skills
- New Product Introduction
- Project Management
- Relationship Building for Small/Medium-Sized Mfg.
- Business Administration for Small/Medium-Sized Mfg.
- Selling/Serving the Customer
- Strategic Planning
- Sustainability
- Technical Writing

COMPUTER SKILLS

- Accounting Systems
- Basic Operations
- Communications Systems
- Database Management
- Computer Aided Design
- Computer Aided Engineering
- Enterprise Resource Planning/ Material Requirements Planning /Material Review Board PLEX System
- Graphics
- Internet
- Payroll Systems
- Presentations
- Programming
- Publishing
- Spreadsheets
- Technical Writing
- Telecommuting
- Website Development and Maintenance

CONTINUOUS IMPROVEMENT

- Basic Quality Tools
- Building Teams
- Business Improvement Principles

- Communication Skills
- Continuous Improvement Skills
- Cycle-Time Reduction Techniques
- Cycle-Time Management Techniques
- Decision Making Skills
- Defining Problems
- Design for Manufacturing Acceptability
- Design of Experiments
- Effective Meetings
- Effective Teams
- Effective Writing
- Interpreting & Analyzing Data
- ISO
- Lean Manufacturing
- Leadership Skills
- Manufacturing Excellence
- Monitoring The Process
- Process Control Principles
- Process Capabilities
- Process Improvement
- Process/Product Handling
- Production Scheduling
- Production Operations/Workflow
- Root Cause Analysis:
    - Data Collection
    - Design for Manufacturing Acceptability
    - Design of Experiments
    - Developing Statistical Process Control (SPC)
    - Documenting Processes
    - Evaluating SPC
    - Failure Mode Effects Analysis
    - 5S Principles
    - Implementing SPC
    - Kaizen Principles
    - Kanban Principles
    - Key Process Indicators
    - Lean Manufacturing Principles
    - Organizing for SPC
    - Root Cause Analysis
    - SPC Concepts, Theory & Application
    - SPC Tools
    - SPC
    - Six Sigma
    - Statistical Techniques
    - Taguchi Methods
    - Variation/Process Control
    - Validation
- System Analysis
- System Strategies

- Team Building/Problem Solving:
    - Building Teams
    - Communication
    - Creative/Innovative Thinking
    - Decision Making
    - Developing Action Plans
    - Developing Solutions
    - Effective Teams
    - Empowerment Process
    - High Performance Work Teams
    - Leadership
    - Multicultural Communication/Diversity
    - Problem Solving
    - Self-Directed Work Teams
    - Situation/Problem Solving
    - Team Concepts
    - Team Building/Problem Solving
    - Teamwork in an Empowered Workforce
- Total Quality Management (TQM):
    - Audit Planning
    - Basic Quality Tools
    - Benchmarking
    - Business Process Improvement Change Process
    - Continuous Improvement
    - Creative Problem Solving/Innovation
    - Creative/Innovative Thinking
    - Developing TQM
    - Evaluating TQM
    - Implementing TQM
    - Organizing for TQM
    - Quality Concepts
    - TQM Strategies
- Train-the-Trainer
- Value Stream Mapping
- Variation/Process Control

HAZARDOUS MATERIALS

- Explosive Materials Handling and Disposal

MANUFACTURING SKILLS

- Composite Structural Bonding:
    - Composite Repair
    - Precision Hole Drilling in Composite Materials
    - Federal Aviation Administration Designated Airworthiness Rep
    - Structural Composite Part Inspection
    - Structural Composite Bonding Inspection
    - Non-Structural Adhesive Bonding Inspection
    - Non-Destructive Inspection
- Assembly Operations
- Automated Equipment
- Blueprint Reading
- Computer Numeric Control

- Cellular Manufacturing
- Cycle Time Reduction
- Electronics
- Electronic Assembly Workmanship
- Equipment Operations
- Equipment/Preventive Maintenance
- Ergonomics
- Facilities Management
- 5S Principles
- Inventory Control
- International Standards Organization Certification
- Kaizen Principles
- Kanban Principles
- Layout
- Lean Manufacturing Principles
- Machining
- Machine Tool Technology
- Introduction to Hand Tools
- Manufacturing Processes
- Metrology/Geometric Dimensioning & Tolerances
- Mounts
- Optimal Operating Methods
- Production Techniques
- Programmable Logic Controllers
- Quality
- Root Cause Analysis
- Set-Up Reduction
- Shipping/Receiving
- Shop Skills -- Drawing, Measurement and Instrumentation
- Special Machines/Inspections
- Statistics Skills for Operations
- Technical Training
- Total Productive Manufacturing
- Total Quality Management
- Understanding Product Specs/Drawings
- Value Stream Mapping
- Warehousing Operations/Distribution
- Work Measurement
- Workflow
- World Class Manufacturing Principles

Productive Lab Hours

0-60

MANUFACTURING SKILLS (Ratio 1:3)

- Carbon Fiber Sanding
- Carbon Fiber Spray Painting
- Verification of Special Processes
- Foreign Object Detection
- Personal Protective Equipment Spraying/Blending Techniques
- Personal Protective Equipment Bonding Techniques - Carbon Fibers

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

RETRAINEE - JOB CREATION

Training Proposal for:

Sparta Consulting, Inc. dba KPIT Technologies

Agreement Number: ET15-0464

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Technology/IT Priority Industry: ☒ Yes ☐ No
Counties Served:	Orange and Sacramento	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 86	U.S.: 292	Worldwide: 9,000
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	12%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$195,672		$0	$0		$195,672

In-Kind Contribution:	100% of Total ETP Funding Required	$496,000

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	Advanced Technology, Business Skills, Continuous Improvement	71	8-200	0	$2,232	$30.00
				Weighted Avg: 124			
2	Retrainee Job Creation Initiative Priority Rate	Advanced Technology, Business Skills, Continuous Improvement	15	8-200	0	$2,480	$33.50
				Weighted Avg: 124			

Minimum Wage by County: Job 1: $15.75 for Sacramento County and $16.02 for Orange County. **Job 2:** $13.13 for Sacramento County and $13.35 for Orange County.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		1
Accounting Staff		2
SAP Technical Developer 1		11
SAP Technical Developer 2		5
SAP Functional Developer		10
SAP Team Lead		7
Project Manager		14
Solutions Architect 1		4
Solutions Architect 2		3
Sales Representative		7
Marketing Representative		7
Job Number 2		
SAP Technical Developer 1		5
SAP Technical Developer 2		5
SAP Functional Developer		5

INTRODUCTION

Sparta Consulting, Inc. was founded in 2007 in Folsom. The Company provides Information Technology (IT) services that focus on the installation of Enterprise Resource Planning (ERP) systems using Systems, Applications & Products in Data Processing (SAP) software. Sparta Consulting, Inc. has 5 locations in the U.S., 2 of which are located in California: Folsom and Newport Beach. The Corporate Headquarters located in Folsom and the Southern California office located in Newport Beach will participate in ETP training.

KPIT Technologies (KPIT) is eligible for standard retraining for companies meeting the definition of an industry deemed by the panel as facing out-of-state competition. In 2009, Sparta Consulting, Inc. was purchased by KPIT, a business located in Pune, India. KPIT has 19 locations throughout North America, Asia, Europe, and Africa and specializes in consulting services which provide their customers with technology workplace solutions. Sparta Consulting, Inc. is a subsidiary of KPIT and is among the fastest growing SAP consultancies in North America.

Need for Training

The IT consulting industry has changed significantly in the past couple of years with the introduction of Cloud-based technology. Businesses are transitioning from a period in which data was stored on local servers, to a world in which data can be accessed through the internet from servers located thousands of miles away. KPIT's business model for SAP consulting is transforming to meet the new needs of their customers and to offer the most current technologies. To remain competitive in the IT consulting industry, it is necessary for KPIT to train staff on Cloud-Computing technology.

Customers who purchase SAP software licenses will have KPIT install, customize, test, and deploy the software throughout the organization. Each SAP software program allows customization to meet the individual needs of the user. Understanding the customization options of each software program is key to implementation success. SAP has recently released new software programs, and other SAP software programs have received significant updates. The recent software releases and updates have driven the need for staff to learn operational procedures for SAP software programs such as Hana, Success Factor, Haboop, hybris, and Fiori. Each SAP program has its own unique architecture, and training must be delivered separately for each. With the proper training, developers and architects will be able to meet and exceed customer expectations no matter what SAP software they chose.

In addition, KPIT's training will focus on improving employees soft skills such as communication, writing and interpersonal skills. Continuous improvement training is also included in the training plan to improve efficiencies, processes and problem solving.

Retrainee - Job Creation

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

KPIT has committed to hiring 15 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.

KPIT has been in a continuous growth mode, and continues to secure a greater percentage of market share on a annually. To support an increase in the number of clients that KPIT will serve, new positions within the organization will be created. During the fiscal year, KPIT is expecting a 10% increase in revenue deriving from new clients. KPIT's forecasts over the next 2 years show the need for up to 50 new-hires in California. Only 15 will be hired in this Agreement.

Project Details

Training Plan

KPIT will use Classroom/laboratory and E-Learning training delivery methods. In-house subject matter experts and external training vendors will be utilized to deliver training.

E-Learning will be utilized to reduce the cost of training as travel will not be required. Trainees will receive between 8 – 200 hours of training.

Business Skills (10%): Training will be delivered to all occupations to foster continuous company growth. To meet company goals, all staff requires training to improve communication, interpersonal, product knowledge, and analytical skills. Training topics will include courses such as Business Communication, Negotiating, Dealing with Difficult People, Business Writing, Financial Analysis, Product Knowledge, and Project Requirements Analysis and Specifications.

Continuous Improvement (10%): Training will be provided to all occupations to improve internal processes and procedures. KPIT's training will focus on staff working through projects in the most efficient manner, while ensuring customer satisfaction. Training topics will include Process Improvement, Project Management, Root Cause Analysis, Time Management, and Change Management.

Advanced Technology (80%): Training will be job specific, delivered to all occupations, excluding Sales Representatives, Marketing Representatives, Accounting Staff and Administrative Staff. Advanced Technology (AT) skills are the life of the business and KPIT must stay current with the ever-changing technology industry. The training will focus on the operation, installation, customization, testing, troubleshooting, and deployment of SAP ERP software at client sites. KPIT will also deliver this AT training in multiple programming languages.

AT will be delivered in highly technical learning environments. The trainer-to-trainee ratio will not exceed 1:10 to allow for in-depth personal attention to each trainee. The daily cost of training will range from $3,200 to $6,400, not including software fees, hardware fees, and setup costs.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. In addition, KPIT will continue to provide sexual harassment prevention, orientation, best practices, and first-aid training.

Impact/Outcome

KPIT's training plan will improve the job-specific knowledge of staff. Staff will be able to work more confidently, efficiently and provide a higher level of customer service. Training will make KPIT a stronger company from within and will lead to continuous growth of the business.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

KPIT retained Sierra Consulting Services in Cameron Park to assist with development of this proposal for a flat fee of $15,000.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Communication
- Business Fundamentals
- Business Writing
- Behavior Style Strategies
- Customer Relationship Management
- Communication styles
- Cost Control
- Dealing with Difficult People
- Employee Coaching
- Financial Analysis
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques
- Negotiating
- Operational skills
- Personal Image
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications

CONTINUOUS IMPROVEMENT

- Cross Training
- Creating a Quality Organization
- Change Management
- Decision Making
- How to Coach and Mentor
- Leadership
- Meeting Management
- Process Improvement
- Project Management
- Problem Solving and Decision Making
- Root Cause Analysis
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Time Management

ADVANCED TECHNOLOGY (1:10 Ratio)

0-200

SAP BW 7.3 on SAP HANA 1.0
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: NW BW 7.3

- SAP HANA Basics
- SAP NetWeaver BW 7.3
- SAP HANA optimized objects
- DataStore Object (DSO)
- InfoCube
- SemanticPartioned Object (SPO)
- Mixed scenarios of SAP BW and HANA schemas
- Transient Provider
- Publishing of SAP HANA models to Analytical Index
- Composite Provider
- HANA as source system via DB Connect
- BW Workspaces
- Layered Scalable Architecture without SAP HANA
- Layered Scalable Architecture plus plus (LSA++) with SAP HANA

Ariba Procurement: Creating and Managing Invoices
Solution: Cloud
Level: Basic Processes & Foundation
Solution Release: ARIBA PROCUREMENT 12S2

- Introduction to Contract Compliance
- Paper Invoices
- PO-based Electronic Invoices
- Contract-based Invoices
- Non-PO Invoices
- Credit Memos
- Invoice Approval
- Invoice Reconciliation
- OK2Pay and Remittance
- Searching and Reporting

SAP HANA - Introduction
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: HANA SPS08

- Overview of SAP HANA
- Architecture of SAP in-memory computing
- Overview of data provisioning in SAP HANA with the following tools:
- SAP Data Services
- SAP Sybase Replication Server
- SAP LT Replication Server
- SAP Direct Extractor Connection (DXC)

- Flat File upload
- Modeling with SAP HANA
- SAP HANA Interfaces to BI client tools, including:
- SAP BusinessObjects Explorer
- SAP BusinessObjects Analysis
- SAP Crystal Reports
- SAP BusinessObjects Dashboards
- SAP BusinessObjects Web Intelligence

SAP HANA - Data Provisioning
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: HANA SPS08

- Trigger-based replication with SAP Landscape Transformation (SLT SP06)
- Data provisioning using SAP Data Services (DS)
- SAP HANA Direct Extractor Connection (DXC)
- Connecting SAP HANA to other databases using SAP HANA Smart Data Access
- SAP Replication Server (SRS)

SAP HANA - Installation & Operations
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: HANA SPS08

- SAP HANA Landscape
- SAP HANA Architecture
- Installation
- Scale-Out
- Migration from any database into SAP HANA
- Post-Installation
- Administrative Tools for SAP HANA
- Troubleshooting
- Performance analysis
- Operations
- Monitoring Backup & Recovery
- High Availability & Disaster Tolerance
- Security
- User Maintenance and Authorization

SAP HANA - Implementation and Modeling
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: HANA SPS08

- Approaching SAP HANA modeling
- Connecting tables
- Using Graphic Modeling Tools
- Using SQL Modeling Tools
- Other Modeling Features, including

- Decision Tables
- Geospatial Data
- Using Text Search and Analysis
- Managing modeling content
- Security and Authorizations
- Data Provisioning
- Introduction to the Application Function Library

SAP Fiori Implementation and Configuration
Solution: SAP Other Solution
Level: Details, Configuration & Transaction
Solution Release: EHP7 FOR ERP 6.0

- Overview of the SAP Fiori solution
- Introduction to SAP Fiori Apps (Manager & Employee)
- SAP UX strategy relating to SAP Fiori
- SAP Fiori architectures and technology (App types, Architecture structure/details, hardware & software requirements)
- Role of SAP SAPUI5
- Basics of SAP NetWeaver Gateway OData Services
- Configuration overview – Transactional, Fact Sheets, Analytical & Launchpad
- Launchpad overview and functions
- Launchpad configuration
- Theme Designer overview
- SAP Fiori security
- Installation overview & tasks
- Configure Transactional Apps & Factsheets (Search, NW Gateway, Central UI Add-On, Product Specific Add-On)
- Introduction of end to end Data Flow
- SAP Business Workflow basics
- Custom Workflow scenarios to Approve Requests
- Extensibility overview (Concept, skills, tools)
- OData extensibility (Taskflow & SAP NW Gateway)
- UI Field extensibility (Tools, method, concepts)
- HANA XS Engine overview & architecture
- Analytical Apps overview
- Installation of the XS Engine for SAP Fiori Analytical Apps
- Configuration of Analytical Apps (KPI prerequisites, general overview, how to create KPIs)
- Configuration of a KPI
- Basic issue troubleshooting resources

SAP Fiori (Wave V) Administration
Solution: SAP Other Solution
Level: Details, Configuration & Transaction
Solution Release: SAP FIORI (WAVE V)

- Introduction SAP Fiori Administration:
- SAP User Experience Strategy
- SAP User Experience Tools and Technologies
- SAP User Experience and Administration Overview:

- Launchpad Administration Overview
- SAP Fiori and the Administrator Role
- Launchpad and Theme Designer Administration:
- Configuring Authorization Roles
- Analyzing Intents for SAP Fiori Launchpad
- Configuring Launchpad Navigation
- Translate Tiles, Catalogs, and Groups in SAP Fiori Launchpad
- Assigning Catalogs to Roles
- Assigning Groups to Roles
- Theme Designer Administration
- Standard and Custom Apps Deployment:
- Deployment Overview
- Standard Apps Deployment Methods
- Custom Fiori Apps Deployment
- SAP Fiori and Security:
- SAP Fiori Security Overview
- Authentication and Authorization
- Transport Security
- Device Level Security
- UI Troubleshooting:
- Launchpad Troubleshooting
- Theme Designer Troubleshooting
- SAP Gateway and Data Services Troubleshooting:
- SAP Gateway (OData) Troubleshooting Overview
- Activating OData Services
- SAP Web Dispatcher Configuration
- SAP Fiori and Runtime Troubleshooting:
- Connectivity Troubleshooting
- Transaction Troubleshooting
- Logging and Tracing

hybris - SAP Solution Integration
Solution: SAP Other Solution
Level: Details, Configuration & Transaction
Solution Release: EHP7 FOR ERP 6.0

- Introduction hybris-SAP Solution Integration
- Installation and Configuration of hybris Platform and Datahub Extensions
- Install and Configure hybris Platform v5.4
- Install and Configure hybris Datahub v5.4
- Common Configuration Checklist
- Set up System Connections for hybris-SAP Solution Integration
- Configure Basic Settings on SAP ERP for Asynchronous Data Replication to DataHub
- Synchronize Common Data between SAP ERP and hybris
- Customer Master Data Exchange
- Product Master Data & Stock Level Exchange
- Pricing Master Data Exchange
- Replication of Prices and Discounts
- Asynchronous Order Management

- Synchronous Order Management

Tableau Advance Training

- Build complex calculations to manipulate your data.
- Use statistical techniques to analyze your data.
- Use parameters and input controls to give users control over certain values.
- Implement advanced geographic mapping techniques and use custom images and geocoding to build spatial visualizations of non-geographic data.
- Combine data sources by using data blending.
- Combine data from multiple tables in the same data source by using joins.
- Make your visualizations perform as well as possible by using the Data Engine, extracts, and using efficient connection methods.
- Build better dashboards using techniques for guided analytics, interactive dashboard design, and visual best practices.
- Implement efficiency tips and tricks.
- Use Tableau Server in a basic way to share your visualizations.

E-Learning Hours

0-200

BUSINESS SKILLS

- Business Communication
- Business Fundamentals
- Business Writing
- Behavior Style Strategies
- Customer Relationship Management
- Communication styles
- Cost Control
- Dealing with Difficult People
- Employee Coaching
- Financial Analysis
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques
- Negotiating
- Operational skills
- Personal Image
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications

CONTINUOUS IMPROVEMENT

- Cross Training
- Communication Skills
- Creating a Quality Organization
- Change Management
- Decision Making

- How to Coach and Mentor
- Leadership
- Meeting Management
- Process Improvement
- Project Management
- Problem Solving and Decision Making
- Root Cause Analysis
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Time Management

E-Learning Hours (Advanced Technology)

0-200

SAP BW 7.3 on SAP HANA 1.0
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: NW BW 7.3

- SAP HANA Basics
- SAP NetWeaver BW 7.3
- SAP HANA optimized objects
- DataStore Object (DSO)
- InfoCube
- SemanticPartioned Object (SPO)
- Mixed scenarios of SAP BW and HANA schemas
- Transient Provider
- Publishing of SAP HANA models to Analytical Index
- Composite Provider
- HANA as source system via DB Connect
- BW Workspaces
- Layered Scalable Architecture without SAP HANA
- Layered Scalable Architecture plus plus (LSA++) with SAP HANA

Ariba Procurement: Creating and Managing Invoices
Solution: Cloud
Level: Basic Processes & Foundation
Solution Release: ARIBA PROCUREMENT 12S2

- Introduction to Contract Compliance
- Paper Invoices
- PO-based Electronic Invoices
- Contract-based Invoices
- Non-PO Invoices
- Credit Memos
- Invoice Approval
- Invoice Reconciliation
- OK2Pay and Remittance
- Searching and Reporting

SAP HANA - Introduction
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: HANA SPS08

- Overview of SAP HANA
- Architecture of SAP in-memory computing
- Overview of data provisioning in SAP HANA with the following tools:
- SAP Data Services
- SAP Sybase Replication Server
- SAP LT Replication Server
- SAP Direct Extractor Connection (DXC)
- Flat File upload
- Modeling with SAP HANA
- SAP HANA Interfaces to BI client tools, including:
- SAP BusinessObjects Explorer
- SAP BusinessObjects Analysis
- SAP Crystal Reports
- SAP BusinessObjects Dashboards
- SAP BusinessObjects Web Intelligence

SAP HANA - Data Provisioning
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: HANA SPS08

- Trigger-based replication with SAP Landscape Transformation (SLT SP06)
- Data provisioning using SAP Data Services (DS)
- SAP HANA Direct Extractor Connection (DXC)
- Connecting SAP HANA to other databases using SAP HANA Smart Data Access
- SAP Replication Server (SRS)

SAP HANA - Installation & Operations
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: HANA SPS08

- SAP HANA Landscape
- SAP HANA Architecture
- Installation
- Scale-Out
- Migration from any database into SAP HANA
- Post-Installation
- Administrative Tools for SAP HANA
- Troubleshooting
- Performance analysis
- Operations
- Monitoring Backup & Recovery
- High Availability & Disaster Tolerance

- Security
- User Maintenance and Authorization

SAP HANA - Implementation and Modeling
Solution: SAP HANA
Level: Details, Configuration & Transaction
Solution Release: HANA SPS08

- Approaching SAP HANA modeling
- Connecting tables
- Using Graphic Modeling Tools
- Using SQL Modeling Tools
- Other Modeling Features, including
- Decision Tables
- Geospatial Data
- Using Text Search and Analysis
- Managing modeling content
- Security and Authorizations
- Data Provisioning
- Introduction to the Application Function Library

SAP Fiori Implementation and Configuration
Solution: SAP Other Solution
Level: Details, Configuration & Transaction
Solution Release: EHP7 FOR ERP 6.0

- Overview of the SAP Fiori solution
- Introduction to SAP Fiori Apps (Manager & Employee)
- SAP UX strategy relating to SAP Fiori
- SAP Fiori architectures and technology (App types, Architecture structure/details, hardware & software requirements)
- Role of SAP SAPUI5
- Basics of SAP NetWeaver Gateway OData Services
- Configuration overview – Transactional, Fact Sheets, Analytical & Launchpad
- Launchpad overview and functions
- Launchpad configuration
- Theme Designer overview
- SAP Fiori security
- Installation overview & tasks
- Configure Transactional Apps & Factsheets (Search, NW Gateway, Central UI Add-On, Product Specific Add-On)
- Introduction of end to end Data Flow
- SAP Business Workflow basics
- Custom Workflow scenarios to Approve Requests
- Extensibility overview (Concept, skills, tools)
- OData extensibility (Taskflow & SAP NW Gateway)
- UI Field extensibility (Tools, method, concepts)
- HANA XS Engine overview & architecture
- Analytical Apps overview
- Installation of the XS Engine for SAP Fiori Analytical Apps

- Configuration of Analytical Apps (KPI prerequisites, general overview, how to create KPIs)
- Configuration of a KPI
- Basic issue troubleshooting resources

SAP Fiori (Wave V) Administration
Solution: SAP Other Solution
Level: Details, Configuration & Transaction
Solution Release: SAP FIORI (WAVE V)

- Introduction SAP Fiori Administration:
- SAP User Experience Strategy
- SAP User Experience Tools and Technologies
- SAP User Experience and Administration Overview:
- Launchpad Administration Overview
- SAP Fiori and the Administrator Role
- Launchpad and Theme Designer Administration:
- Configuring Authorization Roles
- Analyzing Intents for SAP Fiori Launchpad
- Configuring Launchpad Navigation
- Translate Tiles, Catalogs, and Groups in SAP Fiori Launchpad
- Assigning Catalogs to Roles
- Assigning Groups to Roles
- Theme Designer Administration
- Standard and Custom Apps Deployment:
- Deployment Overview
- Standard Apps Deployment Methods
- Custom Fiori Apps Deployment
- SAP Fiori and Security:
- SAP Fiori Security Overview
- Authentication and Authorization
- Transport Security
- Device Level Security
- UI Troubleshooting:
- Launchpad Troubleshooting
- Theme Designer Troubleshooting
- SAP Gateway and Data Services Troubleshooting:
- SAP Gateway (OData) Troubleshooting Overview
- Activating OData Services
- SAP Web Dispatcher Configuration
- SAP Fiori and Runtime Troubleshooting:
- Connectivity Troubleshooting
- Transaction Troubleshooting
- Logging and Tracing

hybris - SAP Solution Integration
Solution: SAP Other Solution
Level: Details, Configuration & Transaction
Solution Release: EHP7 FOR ERP 6.0

- Introduction hybris-SAP Solution Integration

- Installation and Configuration of hybris Platform and Datahub Extensions
- Install and Configure hybris Platform v5.4
- Install and Configure hybris Datahub v5.4
- Common Configuration Checklist
- Set up System Connections for hybris-SAP Solution Integration
- Configure Basic Settings on SAP ERP for Asynchronous Data Replication to DataHub
- Synchronize Common Data between SAP ERP and hybris
- Customer Master Data Exchange
- Product Master Data & Stock Level Exchange
- Pricing Master Data Exchange
- Replication of Prices and Discounts
- Asynchronous Order Management
- Synchronous Order Management

Tableau Advance Training

- Build complex calculations to manipulate your data.
- Use statistical techniques to analyze your data.
- Use parameters and input controls to give users control over certain values.
- Implement advanced geographic mapping techniques and use custom images and geocoding to build spatial visualizations of non-geographic data.
- Combine data sources by using data blending.
- Combine data from multiple tables in the same data source by using joins.
- Make your visualizations perform as well as possible by using the Data Engine, extracts, and using efficient connection methods.
- Build better dashboards using techniques for guided analytics, interactive dashboard design, and visual best practices.
- Implement efficiency tips and tricks.
- Use Tableau Server in a basic way to share your visualizations.

Note: Reimbursement for retraining is capped at 200 total training hours per trainee for trainees enrolled in Job Number 1 or Job number 2, regardless of the method of delivery.

RETRAINEE - JOB CREATION

Training Proposal for:

Villara Corporation

Agreement Number: ET15-0459

Panel Meeting of: June 26, 2015

ETP Regional Office: Sacramento **Analyst:** K. Smiley

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee HUA	Industry Sector(s):	Construction Priority Industry: ☒ Yes ☐ No
Counties Served:	Sacramento, Solano, Santa Clara, San Joaquin, Fresno	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 600	U.S.: 600	Worldwide: 600
Turnover Rate:	19%		
Managers/Supervisors: (% of total trainees)	4%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$219,360		$0	$0		$219,360

In-Kind Contribution:	100% of Total ETP Funding Required	$249,100

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, Manufacturing Skills, Literacy Skills, PL-Manufacturing Skills, PL-Commercial Skills	335	8-200	0-15	$540	$15.07
				Weighted Avg: 30			
2	Retrainee Job Creation Priority	Business Skills, Commercial Skills, Computer Skills, Manufacturing Skills, Literacy Skills, PL-Manufacturing Skills, PL-Commercial Skills	17	8-200	0-15	$660	$12.33
				Weighted Avg: 33			
3	Retrainee Job Creation Priority HUA	Business Skills, Commercial Skills, Computer Skills, Manufacturing Skills, Literacy Skills, PL-Manufacturing Skills, PL-Commercial Skills	11	8-200	0-15	$660	*$10.00
				Weighted Avg: 33			
4	Retrainee Priority HUA	Business Skills, Commercial Skills, Computer Skills, Manufacturing Skills, Literacy Skills, PL-Manufacturing Skills, PL-Commercial Skills	37	8-200	0-15	$540	$11.30
				Weighted Avg: 30			

* It will be made a condition of contract that the trainees in this Job Number will never be paid less than the 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: $15.75 for Sacramento County, $15.07 for Solano County, and $16.44 for Santa Clara County; **Job Number 2**: $12.33 for Solano County, $13.13 for Sacramento County, and $13.70 for Santa Clara County; **Job Number 3**: $10.00 for San Joaquin and Fresno counties; and **Job Number 4**: $11.30 for San Joaquin and Fresno 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
Job Numbers 1, 2 and 4 may use up to $1.43 to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Field Installers		190
Plant Workers		105
Managers		18
Office Staff		22
Job Number 2		
Field Installer		10
Plant Worker		5
Office Staff		2
Job Number 3		
Field Installer		8
Plant Worker		2
Office Staff		1
Job Number 4		
Field Installer		15
Plant Worker		10
Office Staff		12

INTRODUCTION

Villara Corporation (Villara), formally Beutler Corporation, founded in 1947 and located in McClellan, is an HVAC contracting and sheet metal fabricating company. The Company provides renovation and new construction services for residential and commercial customers. In addition, Villara provides structured wiring, security systems, home theaters, central vacuums, plumbing, electrical, solar, and fire protection.

Villara's business model combines HVAC, plumbing, low-voltage wiring, solar photovoltaic, and electrical work skill sets. The model allows tasks that were previously completed separately to be completed simultaneously. This shortens project completion time, reduces conflict between trades, and reduces project cost.

Villara is eligible for standard retraining under the Out-of-State Competition Provisions for the design, manufacturing, and installation of custom and retail residential and commercial HVAC systems and units.

PROJECT DETAILS

In 2010, Villara entered into their first Agreement with ETP to provide training in green technology production. Villara expanded into a new market which included manufacturing and installation of a flash evaporative pre-cooler device known as FlashCool and Solar Panels. Trainees received training in manufacturing and installation of these new products.

In 2014, Villara began a second Agreement with ETP that focused on upgrading incumbent workers skills. The training included installation of HVAC, Digital Home systems, and testing of Home Energy Rating System (HERS). The training focused on increasing Field Installers skill sets in both commercial and residential construction.

This proposal is intended to build upon the previously offered training. Villara will offer training that was provided in the previous agreement to newly hired trainees and to incumbent staff that did not receive this training in the previous contract. Villara will train Plant Workers, Clerical Staff and Managers.

Villara purchased and installed a 3D printer and a Plasma Arc Metal Cutting Machine in March of 2015, to increase production and stay competitive within the industry. Villara will train Clerical Staff and Management in two recently purchased and installed computer programs. Villara has purchased SalesForce Customer Relations Management (CRM) software and Systems, Applications & Products in Data Processing (SAP) software. These programs will increase customer satisfaction and increase productivity.

Training Plan

Business Skills (5%): Training will be provided to Clerical Staff and Managers to enhance project management skills and increase customer satisfaction. Topics will include Project Management, Customer Service and “Soft Skills” Dealing with Difficult People.

Commercial Skills (50%): Training will be provided to Plant Workers, Field Installers and Managers to improve production, safety and expand trainee’s skill sets. Topics will include HVAC Installation, Solar Installation, Plumbing and Servicing Digital Homes.

Computer Skills (15%): Training will be provided to all staff to increase company sales and customer satisfaction. Training topics will include Salesforce CRM, Access and SAP.

Manufacturing Skills (25%): Training will be provided to Field Installers, Plant Workers and Managers to improve facility operations. Training topics will include, 3D Printer, Metal Fabrication and Breaking Metal.

Literacy Skills (5%): Training will be provided to staff in need of literacy training. This training will enhance employee communication.

Retrainee - Job Creation

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

Villara has committed to hiring 28 new employees (Job Numbers 2&3). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

In March of 2015, Villara purchased and installed two new pieces of machinery: a 3D printer and a Plasma Arc Metal Cutting Machine. This machinery will allow Villara to manufacture more of the products that they would normally purchase from a vendor. This machinery will also allow Villara to expand production capacity in the manufacturing division. Villara will be adding production shifts to accommodate the new machinery and production.

Villara revenue is expected to grow by 15% the next year due to an increase in secured contracts. In order for Villara to meet this demand, they will need to hire and train new staff.

Productive Laboratory

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

Villara is requesting Commercial and Manufacturing Skills Productive Lab (PL) training for 28 trainees due to newly installed machinery and the inability to create a field work environment in a class lab setting. Plant Workers will receive PL training on 3D Printers, Plasma Arc Metal Cutting Machine, and Sheet Metal brakes. This is technical equipment that will require in-depth training for trainees to become proficient.

Villara is also requesting PL training for its Field Installers. This training will include HVAC Installation and Maintenance, Digital Homes, Solar Installation and Commercial Services. The environment in which these Field Installers complete their work cannot be recreated in a class lab environment.

The Commercial Skills PL training is projected to reduce installation and maintenance time by 50%. The Manufacturing Skills PL training is projected to reduce production by 25-50%. Villara will maintain a 1:3 trainer-to-trainee ratio. Villara is requesting a ratio of 1:3 because trainees work in groups when on the job site.

Commitment to Training

Villara 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.

Villara invests $129,000 annually per facility for training. Training includes HVAC Training, Management Training, Computer Training, Module Training for Plumbing, Solar, Digital Homes, Residential and Multi-Family HVAC, Service, Customer Service, Warehouse and Manufacturing. This training is company-wide, job specific and mandatory for all employees.

Villara has a detailed training plan and trainers familiar with ETP record keeping. In Addition, Villara has three staff members dedicated to monitoring this project.

High Unemployment Area

The 48 trainees in Job Numbers 3 and 4 work in a High Unemployment Area (HUA), regions with unemployment exceeding the state average by at least 25%. The Company has requested the HUA wage for the 48 trainees in Job Numbers 3 and 4. The Company's locations in San Joaquin and Fresno counties qualify 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.

Impact/Outcome

Villara's hopes training will improve efficiency and production among incumbent workers. They also antisipate trainees will master the newly installed machinery which will allow Villara to expand and grow.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Villara under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET14-0372	$12,960	6/01/2014-5/30/2016	30	29	29

Based on ETP Systems, 696 reimbursable hours have been tracked for potential earnings of $15,528 (97% of approved amount). All trainees are currently in retention.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET10-0265	McClellan	12/31/2009-12/30/2011	$74,880	$13,230 (18%)

During this Agreement, Villara expanded into a market that included manufacturing and installation of green products. This was a high-cost product line that did not sell well during the economic downturn. Due to the economic downturn and Villara's decision to forgo the customized training under ET10-0265 in exchange for funding through the Sacramento Employment Training Agency, the agreement was unsuccessful.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Project Management
- "Soft Skills" Dealing with Difficult People
- Customer Service

COMMERCIAL SKILLS

- Servicing Digital Homes
- Commercial Service
- Commercial & Multi-Family New Construction
- HVAC Installation and Maintenance
- Plant Operations
- Plumbing
- Retrofit Multi-Family
- Service & HERS Testing
- Solar Installation

COMPUTER SKILLS

- Microsoft Excel
- Microsoft Word
- Microsoft Outlook
- Access
- Systems, Applications & Products in Data Processing (SAP)
- Salesforce Customer Relations Management (CRM)

MANUFACTURING SKILLS

- 3D Printer
- Plasma Cutter
- Metal Fabrication
- Duct Board Fabrication
- Tri-Fab Fabrication
- Soldering
- Breaking Metal

LITERACY SKILLS

- English as Second Language

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

Productive Lab Hours

0-60 Trainees may receive any of the following:

MANUFACTURING SKILLS (limited ratio 1:3)

- 3D Printer
- Plasma Cutter

- Metal Fabrication
- Duct Board Fabrication
- Tri-Fab Fabrication
- Soldering
- Breaking Metal

COMMERCIAL SKILLS (limited ratio 1:3)

- Servicing Digital Homes
- Commercial Service
- Commercial & Multi-Family New Construction
- HVAC Installation and Maintenance
- Plant Operations
- Plumbing
- Retrofit Multi-Family
- Service & HERS Testing
- Solar Installation

CBT Hours

0-15 Trainees may receive any of the following:

COMPUTER SKILLS

- Access (2) (1hour)
- Access (3) (1hour)
- Excel (2) (1hour)
- Excel (3) (1hour)
- Outlook (2) (1hour)
- Outlook (3) (1hour)
- Power point (2) (1hour)
- Power point (3) (1hour)
- Word (2) (1hour)
- Word (3) (1hour)
- Excel 2010 Charts (1hour)
- Excel 2010 Formulas and Functions (1hour)
- Excel 2010 PivotTables (1hour)
- Microsoft Office 2010 Macros (1hour)
- Microsoft Office 2010 Shortcuts, Tips, and Tricks (1hour)

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. PL is capped at 60 hours per-trainee.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Jewish Vocational Service of Los Angeles

Agreement Number: ET15-0479

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	New Hire At-Risk Youth Multiple Barriers SET HUA	Industry Sector(s):	Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Los Angeles, Orange, San Diego, Ventura, Kern, San Bernardino, Riverside	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$593,000		$56,830 12%		$649,830

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	New Hire SET Multiple Barriers	Commercial Skills, Other Titles-Job Readiness Skills	160	8-260	0	$3,419	$12.33
				Weighted Avg: 156			
2	New Hire SET Multiple Barriers At-Risk Youth	Commercial Skills, Other Titles-Job Readiness Skills	20	8-260	0	$3,419	$10.10
				Weighted Avg: 156			
3	New Hire SET Multiple Barriers HUA	Commercial Skills, Other Titles-Job Readiness Skills	10	8-260	0	$3,441	$10.10
				Weighted Avg: 157			

Minimum Wage by County: Job Number 1 (SET-MB): $13.31 for Los Angeles County, $13.35 for Orange County, $13.28 for San Diego County, and $12.33 for Ventura, Kern, San Bernardino, and Riverside Counties.
Job Number 2 (SET-MB/At-Risk Youth) and Job Number 3 (SET-MB/HUA): $10.10 for Los Angeles, Orange, San Diego, Ventura, Kern, San Bernardino, and Riverside Counties.

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

Used to meet the Post-Retention Wage?: ☐ Yes ☐ No ☒ Maybe
Participating employers may use health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Certified Nurse Assistant/Home Health Aide		35
Maintenance Technician/Handyman/Porter/ Groundskeeper		25
Banker/Teller/Cashier		104
Customer Service & Sales Representative		26

INTRODUCTION

Founded in 1931, Jewish Vocational Service of Los Angeles (JVS) (www.jvsla.org) provides workforce development and career services to the community. JVS is a full resource assisting job seekers to attain professional goals and employers to fulfill business goals. Vocational training is provided through the organization to help individuals' secure entry level positions.

This will be the fourth ETP Agreement for JVS. Under their last Agreement (ET13-0241), approximately 395 trainees received training and job placement with 100% performance. This

project will give trainees skill sets through JVS' BankWorks and HealthWorks training programs as well as their newest program, ApartmentWorks.

PROJECT DETAILS

JVS plans to provide three training programs: BankWorks, HealthWorks, and ApartmentWorks. Trainees enrolled in JVS programs face economic and social barriers that create hardships in obtaining employment. They may be dislocated workers, unemployed adults, at-risk youth, first-time workers, or individuals with disabilities. Services provided are based on comprehensive case management and service integration to ensure trainee employment needs are met.

Once a trainee is enrolled in one of JVS' programs, they attend training on a weekly basis to complete the minimum hour requirement designated for their chosen program. All trainees are provided Job Readiness Skills training to familiarize them with job interviews and professionalism. Following completion of a training program, trainees are provided assistance with job placement to secure work with JVS partners or other entities within the banking, healthcare, and apartment industry.

- BankWorks

The financial industry faces an ongoing need for qualified workers to fill available positions. To meet this need, JVS offers an eight-week/168 hour training program that will prepare trainees to become Bankers, Tellers, Customer Service/Sales Representatives, and Cashiers. Representatives of financial institutions worked alongside JVS staff to ensure the training program is precise and up-to-date in training methods and curriculum topics to fulfill industry needs. Curriculum topics are delivered in four modules: Problem Solving, Banking Terms, Handling Sales Objections and The Various Types of Financial Institutions. Trainees who complete this program receive a JVS BankWorks Certificate of Completion.

- HealthWorks

As the elder population continues to grow, the demand for services in long-term care, assisted living facilities, and acute care also increases. JVS offers a 170-hour training program that will prepare trainees to become Certified Nurse Assistants and Home Health Aide Workers. They will learn resident care skills and rehabilitative/restorative care. The curriculum is developed and mandated by the State of California Department of Health and Human Services. Those who complete this program receive a State of California Certified Nurse Assistant Certificate.

- ApartmentWorks

Aided by representatives of the National Apartment Association, JVS conducted interviews and industry round-tables to identify hiring needs for apartment community owners and property management firms in the area. The ApartmentWorks training program will teach trainees maintenance and repair skills in the following: heating, ventilation, air conditioning, plumbing, electrical, interior and exterior repairs, and appliances. Trainees who complete the 120-hour curriculum and pass the final exam will be awarded a certificate by the National Apartment Association. Final occupations include Maintenance Technicians, Handymen, Porters, and Groundskeepers.

Training Plan

Experts in each industry were consulted and assisted in the development of curriculum. Communication with employers remains ongoing in order to critique and update training topics.

Commercial Skills (75%) Training will be offered to all occupations to improve job skills and gain employment. Trainees are provided basic job skills to secure entry level positions in the financial, healthcare, and apartment industry.

Job Readiness Skills (25%) Training will be offered to all occupations. Training in Job Readiness Skills will familiarize trainees with the interview process and new workplace environments, including basic computer skills.

Commitment to Training

JVS 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

JVS has assigned 8 staff members to administer the ETP program. As a repeat contractor, the organization is familiar with tasks required such as enrollment, data entry, scheduling, and training documentation.

Marketing and Support Costs

JVS's Marketing Department and Directors recruit for its programs through community colleges, public service announcements, local high schools, the County of Los Angeles Department of Social Services, and other social service and community organizations. JVS' relationships with community organizations such as the Urban League of Los Angeles and Goodwill establish JVS as a referral and resource for their clients to increase job skills and obtain employment.

JVS seeks full support costs to fund training assessment processes and recruitment of trainees and participating employers. Panel regulation allows support costs of up to 12% for recruitment, as well as assessment of employer-specific job requirements for multiple employer contractors that include At-Risk Youth.

SET/ Multiple Barriers

Under Special Employment Training (SET), trainee employment history is waived, and trainees may receive a higher proportion of Job Readiness Skills (up to 50%). SET will apply to all trainees. Also, all trainees are designated as facing two or more barriers to employment (e.g., mental or physical disability, limited English proficiency, limited math skills). For eligibility as At-Risk Youth (Job Number 2), JVS must document that the trainees are: between 18 and 23 years of age and not in school or employed full-time at time of recruitment. In addition, trainees in Job Number 3 will work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%.

JVS requests the following SET wage and retention modifications:

- Wage Modifications

Based on their multiple barriers to employment, all trainees qualify for the ETP Minimum Wage rather than the higher SET standard wage. The 30 trainees in Job Numbers 2 (At-Risk Youth) and 3 (HUA) also qualify for a modification of up to 25% below the ETP Minimum Wage: $10.10 for Los Angeles, Orange, San Diego, Ventura, Kern, San Bernardino, and Riverside Counties.

For Job Number 3 (At-Risk Youth), training will open up opportunities for good paying jobs for trainees of the local community.

- Retention Modification

Retention for At-Risk Youth trainees (Job Number 2) may be satisfied by employment of at least 30 hours a week for at least 90 days. For occupations in which workers are hired for short-term jobs, retention may be satisfied by employment of at least 500 hours within 180 days. Incidental placement of at-risk youth with public and non-profit entities is permissible but cannot exceed 35% of the number to retain in employment, by job number. Trainees in an HUA (Job Number 3) may satisfy retention by working a minimum of *35* hours per week for at least 90 days out of 120 consecutive days with up to three employers.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, JVS 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.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0241	Statewide	02/25/13-02/24/15	$512,850	$512,850 (100%)
ET11-0201	Statewide	04/06/11-04/05/13	$398,280	$384,616 (96%)

ET13-0241: Based on ETP Systems, 55,807 reimbursable hours have been tracked for potential earnings of $512,850 (100% of approved amount). The Contractor projects final earnings of 100% based on training tracked and final payments submitted to ETP in May 2015.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

American Red Cross of Glendale has been retained to provide training for a fee of $1,500 per trainee for Certified Nurse Assistants/Home Health Aides and Jon Q Home Construction and Remodeling of Northridge has been retained for $40 per hour for instruction in apartment maintenance. Other trainers will be identified for ETP record-keeping purposes as they are retained.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-260 Trainees may receive any of the following:

COMMERCIAL SKILLS

BankWork$™ (Teller, Cashier, Personal Banker, Universal Banker, Customer Service and Sales Representative, Cashier)

- Introduction to BankWork$™ Training Program
  Ice Breaker
  Classroom Rules
  Job Description
  Agenda
  Investment
  Expectations

- Module 1 - The ABC's of the Corporate Workplace
  Dress Code
  Attendance and Punctuality
  The World of Etiquette Corporate style
  What's My Communication Style?
  Effective Listening
  Courtesy and Interpersonal Quiz
  Body Language
  Problem Solving
  Expectations in the Work Environment
  Ethical Behavior
  E-mail Etiquette
  Telephone Etiquette
  Voice Mail

- Module 2 – Banking 101
  Introduction
  Types of Financial Institutions
  Career Opportunities
  The Federal Reserve System
  Regulations
  Identity Theft
  What is a Checking Cccount?
  How to Read a Check
  Things We Need to Know About Bank Accounts
  How to Fill Out a Deposit Slip
  How to Maintain a Check Register
  What is a Debit Card?
  What is a Wire Transfer?
  What is an ACH?
  Instructions for the Check Register
  How Do You Balance a Checkbook?
  The Bookkeeping of Banking

Handling Money
Security
Confidentiality
Bank Robberies
Banking Terms

- Module 3 – Customer Service and Sales
  Customer Service
  Greeting Customers
  Meet Your Customers' Needs
  Selling
  Selling Benefits
  Get to Know Your Customer
  Cross-Selling
  Checklist for Cross-Selling
  Handling Sales Objections
  Handling Customer Complaints
  The Difficult Customer
  The Very Difficult Customer

- Module 4 – Making the Transition
  The First Day on the Job
  Memory Techniques
  What to Expect on the First Day
  Constructive Criticism
  Managing Your Boss
  Do's and Don'ts
  Probation

HealthWorks™ (Certified Nurse Assistant, Home Health Aide)

- Introduction to CNA/HHA
- Patient Rights
- Communication and Interpersonal Skills
- Safe Environment
- Body Mechanics
- Principles of Asepsis
- Weights and Measures
- Resident Care Skills
- Vital Signs
- Nutrition
- Emergency Procedures
- Long Term Care Resident
- Rehabilitative/Restorative Care
- Observation & Charting
- Death and Dying

ApartmentWorks™ (Maintenance Technician, Handyman, Porter, Groundskeeper)

- Inside the Apartment Business
- People, Projects and Profits
- Interior and Exterior Maintenance and Repair
- Electrical Maintenance and Repair
- Plumbing Maintenance and Repair
- Heating, Ventilation and Air Conditioning Maintenance and Repair
- Appliances Maintenance and Repair

ALL PROGRAMS—ALL OCCUPATIONS
JOB READINESS SKILLS
(cannot exceed 50% of the trainee's total training hours)

- Career Planning & Assessment
- Resume Building
- Interviewing Skills
- Workplace Etiquette
- Presentation/Appearance
- Personal Financial Records & Planning
- Customer Service/Bed Side Manners
- Basic Computer Literacy

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

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

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

San Diego Electrical Training Trust

Agreement Number: ET15-0927

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Green Technology Priority Industry: ☒ Yes ☐ No
Counties Served:	San Diego & Imperial	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No International Brotherhood of Electrical Workers, Local 569		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤0%	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$333,340		$23,022 8%		$356,362

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority Rate	Commercial Skills Business Skills Computer Skills OSHA10/30	100	8-200	0	$564	$43.00
				Weighted Avg: 24			
2	Retrainee Apprentice Priority Rate	Commercial Skills OSHA 10	166	8-210	0	$1,807	$20.55
				Weighted Avg: 130			

Minimum Wage by County: $20.55 per hour for SET Statewide priority industry.

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

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

Up to $1.35 per hour may be used to meet the Post-Retention Wage for some Job Number 2 second year Inside Wiremen Apprentices.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journey Worker - Inside Wiremen & Sound Technician		100
2nd Year Apprentice Inside Wireman		45
3rd Year Apprentice Inside Wireman		45
4th Year Apprentice Inside Wireman		21
5th Year Apprentice Inside Wireman		30
2nd Year Apprentice Sound Technician		7
3rd Year Apprentice Sound Technician		13
4th Year Apprentice Sound Technician		5

INTRODUCTION

The San Diego Electrical Training Trust (SDETT or Trust) (www.sdett.org) is dedicated to providing up-to-date industry skills and secure high-quality job opportunities for its members in San Diego and Imperial Counties. SDETT trains electrical workers to install power, lighting, controls, sound and communication controls, and other electrical equipment in commercial, industrial and residential facilities.

The Trust is governed by a Board of Trustees comprised of four labor and four management representatives, and is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 569 and the National Electrical Contractors Association (NECA). Approximately 2,968 apprentices and journeymen work for over 294 signatory employers. The 266 planned retrainees included in this proposal are all members of IBEW Local 569 and covered by separate

collective bargaining agreements for two occupational titles: Inside Electrical Wiremen and Sound Technicians. The apprenticeship program for Inside Wiremen is 5 years in length and the Sound Technician is 4 years.

Employer Demand for Training

The demand for qualified Apprentice and Journeymen electrical workers in Imperial County is so great that the satellite training center in Imperial County schedules classes year round to meet the needs of local employers. Two large-scale utility grade solar projects are currently underway in Imperial County: Imperial Solar Energy Center West and Imperial County Solar Company 2. These two projects employ over 300 IBEW 569 members in a high unemployment (HUA) county. Similarly, demand in San Diego County is increasing due to current and upcoming construction projects including a new Kaiser Permanente hospital (and renovation of existing facilities); Carlsbad Desalination Plant; and Pico Pico Energy Center Gas Turbine Plant.

Participating employers and union representatives have identified the following reasons for Journeymen training: new energy efficiency regulations, the need to reduce costs to remain competitive, higher quality standards, the increasing complexity of construction projects, and a retiring workforce in San Diego and Imperial Counties. SDETT will provide training to workers from both counties for commercial, industrial, residential, and solar farm projects with local signatory contractors.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

Apprenticeships are a multi-year training program that results in DAS certification to work as a Journeyman. They are authorized in California under the Shelly-Maloney Apprenticeship Labor Standards Act of 1939. Apprentices commit to training under contract with an apprenticeship program sponsor. They advance through a series of apprenticeship levels as they complete modules of RSI and on-the-job training. Wages are paid for hours worked on the job, in progression with a series of advancements up to the Journeyman level.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC) or Unilateral Apprenticeship Committee (UAC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management, as compared to a UAC which is created through a trade association. Both types require employer contributions to a training trust fund.

Depending on the type of trade, apprenticeship programs vary in length, typically from 2-6 years. They also vary in size, ranging from less than 10 to several hundred apprentices at any given point in time. Several types of trainees are eligible under the Apprenticeship Program: Apprentices (second-year), Journeymen and Pre-Apprentices. First-year Apprentices are not eligible due to the higher drop-out rates associated with this entry-level.

ETP funding flows through a Multiple Employer Contract (MEC), in this proposal held by a JATC. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency; in this proposal the LEA is Palomar Community College. The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice.

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

Because ETP funding cannot displace another source of government funds, the fixed fee rate is reduced by $5.00 to account for adult education funding appropriated each year for Apprentice training through the California Community College Chancellor's Office and Department of Education. This changes the ETP Priority Industry Rate from $18.00 to $13.00 per hour for all Apprentice Job Numbers.

In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26). [Note: This "blended rate" has been extended to Pre-Apprentices, for ease of administration.]

Under the Apprenticeship Training Program, the post-retention wage has been standardized to $20.55 per hour reflecting the Special Employment Training (SET) wage for Priority Industry. This wage was chosen for ease of administration, recognizing that most Apprentices and all Journeymen exceed the highest ETP wage requirements.

DAS Completion Rates

The average completion rate for Apprentices in the Electrical Industry is 66.3% as measured by DAS over the most recent five-year reporting period (CY2009 through CY2013). The DAS completion rates are 77.02% for San Diego Electrical JATC and 68.9% for San Diego County Sound Technicians JAC, which meets ETP standards.

PROJECT DETAILS

This will be SDETT's third Agreement, although none have been held in the last five years. SDETT will provide OSHA 10/30 and a curriculum in Commercial, Business, and Computer Skills for Journeymen, for both large and small employers.

In addition to the standard RSI, Apprentices will receive OSHA 10. As well, the proposed training is entirely center-based and will be delivered at the Trust's training centers, a 32,000-square-foot state-of-the-art training center in San Diego and a smaller 5,000-square-foot satellite facility in Imperial County.

Training Plan

Apprenticeship Training

Commercial Skills (95%) – Inside Wiremen and Sound Technician apprentices will learn to install, maintain and repair various types of electronics equipment in commercial, industrial and residential establishments. Trainees will also learn to install, connect, and test electrical wiring

systems for lighting, heating, air conditioning and sound and communication systems for any building or structure.

Journeyman Training:

Commercial Skills (80%) - Green training will be the focus, especially energy-efficient technologies and products such as green building materials, solar photovoltaic panels, new motor controls, advanced welding, green materials testing and audit equipment.

Business Skills (5%) - Trainees must understand new national building codes and green practices; follow certification guidelines; use more collaborative bidding and project development practices; meet budgets; interact with various types of construction workers; and implement green solutions in traditional work environments. Training will give workers the tools to plan, organize, and manage their construction projects more efficiently. Training will also include teambuilding and leadership skills so that electricians can lead teams in an effective and efficient manner.

Computer Skills (5%) - Training will include scheduling, planning and modeling software. AutoCAD and Job Tracking applications will provide trainees with the tools to modify blueprints, look up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

Certified Safety Training

OSHA 10/30 – OSHA 10/30 training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of training for Apprentices and 10 or 30 hours for journeymen. The coursework is geared towards 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. This training provides a complete overview of occupational safety and health so that workers are more knowledgeable about workplace hazards.

Curriculum Development

The Apprentice program uses the National Joint Apprenticeship and Training Committee's Curriculum which was developed for the exclusive use of IBEW-NECA. The Journeyman upgrade Curriculum is employer-driven to meet the needs of signatory San Diego and Imperial County employers. The Curriculum was developed and customized with input from both labor and management representatives to address the local needs of union members, participating employers, and the industry as a whole.

Trainer Qualifications

SDETT employs a total of 20 full and part-time trainers. All trainers are former or current members of the trade and some have received Master Certification status by the National Joint Apprenticeship and Training Committee.

Marketing and Support Costs

SDETT conducts marketing through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and its website. Class information will be disseminated throughout the year to all apprentice and journeyman electricians within the jurisdiction, as well as to the electrical contractors who employ them.

Application announcements for the Apprenticeship program are disseminated to local, state and federal agencies as well as to local high schools and community colleges; and community based organizations. The SDETT is also committed to working with the Helmets to Hardhat program to recruit more veterans into its apprenticeship programs.

Ten staff people in the JATC office will assist with marketing, recruitment, needs assessments and scheduling of classes. SDETT is requesting 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. Many participating employers have already been recruited; however, additional recruitment and assessment activities are anticipated. Staff recommends the 8% support costs.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. General safety training is provided by the signatory employers in accordance with all pertinent requirements under state and federal law.

High Unemployment Area

Some Job Number 1 and 2 trainees work in a High Unemployment Area (HUA) exceeding the state average by at least 25%. Although signatory employers with locations in Imperial County qualify for HUA status under these standards, SDETT is not asking for a wage modification.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, SDETT 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

California Labor Federation in Sacramento and Strategy Workplace in Oakland assisted with the development of this proposal at no cost.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200 (Job Number 1)

Trainees may receive any of the following:

Journeyman Training

COMMERCIAL SKILLS

- Codeology:
  - National Electrical Code
  - Other Recognized Standards (Installation Changes)
  - Plan, Build and Use
  - Related Standards (Mandatory and Permissive Rules)
  - Special Occupancies and Equipment
  - Arc Flash

- Analog/Digital Circuit (AC/DC) Principles:
  - Math for Electricians
  - Ohm's Law
  - Generators
  - Inductance/Reactance
  - Series/Parallel Circuits

- Grounding:
  - Grounding and Bounding
  - National Electrical Code Article 100-Definitions and Provisions
  - National Electrical Code Article 110-Requirements
  - National Electrical Code Article 90-Introduction
  - National Electrical Code Article Chapters 1-4
  - Significant Changes to National Electric Code

- Fire Alarm Systems and Installations:
  - Definitions and Systems
  - Initiating Devices and Notification Systems
  - National Electrical Code and Installation Requirements
  - Start Up and Check Out Procedures
  - National Fire Protection Act, 1972 (NFPA 72)

- Fire Life Safety:
  - National Electrical Code (Relating to Fire Alarms)
  - National Electrical Code Article 725
  - National Electrical Code Article 760
  - NFPA 72
  - Principles of Electronics

- Industrial Motor Control:
  - Control Relays and Timers
  - Jogging and Plugging Controls
  - Manual Starters and Magnetic Coils
  - Push Buttons, Selector Switches, and Mechanical Devices
  - Solid State Electronic Devices
  - Variable Frequency Drives

- Programmable Logic Control (PLC):
  - Developing Ladder Programming
  - Introduction to Programmable Equipment
  - Programming Programmable Logic Controllers
  - Using Timers and Counters in Logic Programs
  - Writing a Program

- Electrical Design:
  - 3 and 4-Way Switching
  - Design of Electrical Circuits
  - Magnetic Motor Control and the Code
  - LonWorks and Building Automation
  - Transformers and the Code

- Voice, Data and Video:
  - Audio Distribution
  - CCTV Security Surveillance
  - Computer Networking
  - Fiber Optics
  - Telephonic Interconnect

- Industry Specific Skills:
  - Solar Panel Installation
  - Solar Photovoltaics
  - Building Automation Systems
  - Confined Space Entry
  - Specialized Tools
  - Conduit Bending
  - Rigging and Lifting
  - Firestop Installation
  - Blueprints and Schematics
  - Work Flow and Resources
  - Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
  - Understanding New Technologies and Changes to Industry Standards (Green Training)
  - Proper Equipment Set-Up (Green Training)
  - Safe Working Practices
  - Advanced Instrumentation and Motor Controls
  - Programmable Logic Controllers

- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Management and Monitoring of Materials
- Testing Materials and Equipment–Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)

- California Advanced Lighting Control Program (CALCP)
  - Advanced Lighting Control Systems
  - Lighting Control Strategies
  - Line Voltage Switching Controls
  - Low Voltage Switching Control
  - Dimming Controls
  - Occupancy Sensors
  - Photosensors

- CALCTP Acceptance Testing
- Electric Vehicle Infrastructure Training Program (EVITP)

BUSINESS SKILLS

- Teambuilding Skills
- Green Awareness Training and Green Certifications
- Leadership Skills
- Customer Service Skills
- Conflict Resolution
- Problem Solving
- Decision Making Skills
- Inventory Checklist
- Advanced Time Management
- Filling Out Work Documents and Reports Accurately
- Project Management
- Creating Project Bids

COMPUTER SKILLS

- Auto Computer-Aided Design (AutoCAD)
- Job Tracking System
- Scheduling & Planning Jobs

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10 (requires completion of 10-hour course)
- OSHA 30 (requires completion of 30-hour course)

Class/Lab Hours
8 – 210 (Job Number 2)

Apprentice Training

COMMERCIAL SKILLS

- Safety:
  - General Job-Site Safety Awareness
  - First Aid/CPR Certification
  - Emergency Procedures
  - Compliance with OSHA, NFPA and EPA Regulations
  - Substance Abuse Awareness

- Tools, Materials and Handling:
  - Proper Care and Use of Hand and Power Tools
  - Proper Rigging Methods
  - Proper Digging Techniques
  - Proper Use of Motorized Equipment; Platform Lifts, Fork-Lifts & Bucket Trucks
  - Proper Material Lifting and Handling

- Math:
  - Appropriate Mathematical Calculations to Solve for Related Problems.

- Electrical Theory:
  - Basic Electro-Magnetic Principals
  - Ohm's Law
  - AC/DC Theory
  - Series, Parallel and Combination Circuits
  - Characteristics of Circuits: Voltage, Current, Power, Resistance, Impedance, Capacitance and Reactance.
  - Theory of Superposition and Solving for Multiple Voltage-Sourced Circuits
  - Operation and Characteristics of Three-Wire Systems
  - Operation and Characteristics of Three-Phase Systems
  - Use of Electronics in the Electrical Industry
  - Code Requirements
  - National Electrical Code and Local Codes

- Conductors:
  - General Characteristics
  - Conductor Installation Codes and Techniques
  - Methods for Selecting Proper Size and Type of Conductors

- Conduit and Raceways:
  - Terms Associated with Conduits and Raceways
  - Procedures for Laying Out Various Types of Bends
  - Procedures for Making Proper Bends when Fabricating Conduits
  - Conduit Support Systems Recognized by Code

- First Aid/CPR

- Lighting Systems:
  - Function, Operation and Characteristics of Various Lighting Systems
  - Lighting Distribution and Layout

- Installation and Connection of Fixtures:
  - Over-Current Devices
  - Function, Operation and Characteristics of Over-Current Protection Devices
  - NEC Requirements for Over-Current Protection Devices
  - NEC Requirements for Ground-Fault and Arc-Fault Protection

- Grounding Systems:
  - Functions, Operation and Characteristics of Grounding Systems
  - Sizing, Layout and Installation of Grounding Systems
  - Insulation and Isolation
  - Proper Grounding and Bonding Techniques
  - Special Circumstances

- Services and Distribution Systems:
  - Function, Operation and Requirements for Various Panel Boards and Switch Gear
  - Grounding Requirements
  - Code Requirements

- Prints and Specifications:
  - Creation of Blueprints Plans and Specification
  - Use of Blueprints, Plans and Specification
  - Recognizing Information Contained within Blueprints

- Motors, Motor Controllers and Process Controllers:
  - Function, Operation and Characteristics of Motors (AC, DC, Dual-Voltage)
  - Proper Motor Installations
  - Motor Controllers, Control Circuits and Control Devices
  - Control Transformers, Switches and Relays
  - Instrumentation, Process Control Systems and Devices

- Generation and Power Supplies:
  - Principles of Generating Electricity
  - Principles of Alternative Energy Generating Systems
  - Installation and Maintenance of Uninterruptible Power Supplies (UPS)
  - Installation and Maintenance of Emergency Battery Systems

- Transformers:
  - Function, Operation and Characteristics of Transformers
  - Selection and Installation of Transformer Types
  - Transformer Grounding Techniques
  - Harmonics and Power Quality

- Personal Development:
  - Orientation to Organization and Structures
  - Working with Others
  - Personal Financial Development

- Electrical Testing:
  - Steps Used for Various Testing Processes
  - Proper Selection and Use of Test Meters
  - Utilizing the Results of Testing Procedures

- Specialty Systems:
  - Fire Alarms
  - Security Systems

- CALCTP:
  - Advanced Lighting Control Systems
  - Lighting Control Strategies
  - Line Voltage Switching Controls
  - Low Voltage Switching Control
  - Dimming Controls
  - Occupancy Sensors
  - Photosensors

- Electric Vehicle Infrastructure Training Program

OSHA 10 (OSHA Certified Instructor)

- OSHA 10 (requires completion of 10-hour course)

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

Note: Reimbursement for retraining is capped at 200 total hours per trainee for Job Number 1, and 210 total hours per trainee for Job Number 2, regardless of method of delivery.

RESPOND

Training Proposal for:

Butte-Glenn Community College District

Agreement Number: ET15-1005

Panel Meeting of: June 26, 2015

ETP Regional Office: Sacramento **Analyst:** K. Smiley

PROJECT PROFILE

Contract Attributes:	Critical Proposal RESPOND (Alt/Gen Funds) Retrainee SB<100 Priority Rate HUA	Industry Sector(s):	Agriculture Biotechnology/Life Sciences Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Butte, Lassen, Modoc, Siskiyou, Tehama, Glenn	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL:

All funding is from the General Fund as authorized for the RESPOND program.

Program Costs	+	Support Costs	=	Total ETP Funding
$100,298		$17,362 20%		$117,660

In-Kind Contribution:	50% of Total ETP Funding Required	$120,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Cont. Imp., Literacy Skills, Mgmt. Skills	50	8-200	0	$845	$15.07
				Weighted Avg: 40			
2	Retrainee Priority Rate HUA	Commercial Skills, Cont. Imp., Literacy Skills	5	8-200	0	$908	$11.30
				Weighted Avg: 43			
3	Retrainee Priority Rate SB<100	Business Skills, Commercial Skills, Cont. Imp., Literacy Skills, Mgmt. Skills	44	8-60	0	$1,220	$15.07
				Weighted Avg: 40			
4	Retrainee Priority Rate SB<100 HUA	Commercial Skills, Cont. Imp., Literacy Skills	14	8-60	0	$1,220	$11.30
				Weighted Avg: 40			
5	Retrainee Priority Rate HUA	Business Skills	1	8-200	0	$110	$11.30
				Weighted Avg: 6			

Minimum Wage by County: Job Numbers 1 & 3: $15.07 per hour for Butte, Glenn, Lassen, Modoc, Siskiyou and Tehama counties. Job Numbers 2, 4 & 5 (HUA): $11.30 per hour for Glenn, Lassen, Modoc, Siskiyou and Tehama 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
Crop Specialist		7
Economic Development Specialist		5
Farm Worker		20
Maintenance Technician		10

Pesticide Specialist		10
Operation Worker		8
Municipal Supervisor		3
Municipal Manager		2
Irrigation Specialist		11
Production Staff		7
Water Treatment Specialist		5
Urban Planner		3
Rural Planner		2
Municipal Water Specialist		5
Owner		10
Business Analyst		6

INTRODUCTION

Founded in 1968, Butte-Glenn Community College District (Butte-Glenn College) provides academic instruction leading to a two-year, or transfer to a four-year college. The College also trains adult workers in vocational skills. Butte College's main campus is located in Oroville. The college's Contract Education Department (dba The Training Place) is responsible for providing occupational and professional development training options for local employers, as well as individual community members, in Butte and Glenn Counties. All of The Training Place's courses are delivered by professional industry experts and designed to meet the needs of local-area employers. The Training Place provides occupational training at its two locations in Chico.

In this proposal, Butte-Glenn College is collaborating with the Center for International Trade Development (CITD), which is a branch of the community college system. The employers participating in this proposal will be located in a county declared as severely impacted by the drought, by the Governor's office and the California Department of Food and Agriculture.

Employers in the core group are primarily agricultural and food processing manufacturers. Some of these employers are ineligible for core program funding. For this reason, the General Fund appropriation will be used. This proposal will expend the remaining Rapid Employment Strategies Pilot on Natural Disasters (RESPOND) funds from that alternative source.

Need for Training

The drought has brought unprecedented challenge and hardship to Northern California, where agriculture and related services are extremely important to the economy. Businesses are faced with difficult choices as they implement drought-sensitive changes in: crops, irrigation equipment, irrigation schedules and the amount of pesticides and fertilizers used.

Training under this proposal will educate participating employers, to allow informed decisions. The training program will help growers and agriculture service businesses improve water usage efficiencies, irrigation systems, pesticide applications and landscape designs. Participating employers will also receive training on recent technological advances regarding water systems and equipment, which will foster improvement and ensure sustainability.

Companies may be forced to change business processes and therefore will need training in Business Skills. These skills are necessary to remain competitive in their industries. Workers require training on the marketing and sale of drought-related products and services as well as customer service, writing and financial planning skills.

The drought has affected all sectors of these businesses and training will improve production efficiencies, management skills and communication skills by providing trainees with Vocational English as a Second Language training.

RESPOND/Drought

The RESPOND pilot program was adopted by the Panel in early 2014 to fund training in designated drought areas. The drought has impacted several key industry sectors (e.g. agriculture) and could lead to loss of jobs. Hardest hit are the San Joaquin Valley and Central Coast areas. (A total of 24 counties have been identified by the Governor's Office.)

The funds may be "alternate" using a special one-time appropriation of $2,000,000 from the State's General Fund. Funds may also be "core" program as authorized in the RESPOND guidelines. RESPOND funding is used to: (1) support displaced workers; (2) avert layoffs; and (3) help employers transition to more sustainable operations and practices.

Reimbursement Rate

Butte-Glenn College is not requesting a rate modification by reason of RESPOND status. Trainees of priority industry large businesses will receive the standard reimbursement rate of $18 per hour; trainees of priority industry Small Businesses will received the standard reimbursement rate of $26 per hour and trainees of non-priority small businesses will receive the standard reimbursement rate of $22 per hour.

PROJECT DETAILS

Large business trainees in Job Numbers 1, 2 and 5 will receive between 8-200 hours of classroom/laboratory training and Small Business trainees in Job Numbers 3 and 4 will receive between 8-60 hours of classroom/laboratory training.

Business Skills (20%): Training will be offered to Economic Development Specialists, Municipal Supervisors, Municipal Managers, Urban Planners, Rural Planners Municipal Water Specialists, Business Analysts and Owners. Training will focus on marketing, sales, communication, financial analysis and planning. Trainees will be able to successfully market, sell and incorporate drought related products. Training topics will include Creative Marketing, Customer Relationship Management, Cost Control, Financial Analysis, Negotiating, Retaining Customers, Marketing/Sales Techniques, Communication Styles and Strategic Planning.

Literacy Skills (10%): Training will be offered to Operation Workers, Production Staff, Farm Workers and Maintenance Technicians. Trainees will receive English as a Second language (ESL) training from a certified ESL instructor to improve communication and understanding on the job. Vocational English as a Second Language will include courses in Language Skills, Reading, Comprehension and Basic Mathematics.

Commercial Skills (50%): Training will be offered to all occupations and will be specific to the trainee's job duties. Training will focus on drought-related topics to improve water usage efficiencies, irrigation systems, pesticide applications, landscape designs and technological

advances. Training topics will include Crop Irrigation Design, Crop Rotation, Drought Resistant Crops, Irrigation Systems, Pesticide Application in Drought Conditions, Pumps, Soil Management, Water Conservation, Water Management and Landscape Sprinkler Design.

Management Skills (10%): Training will be offered to Municipal Supervisors, Municipal Managers and Owners. Training will focus on the enhancement of techniques used to keep the workforce engaged, productive and focused. Training topics will include Coaching, Decision Making, Leadership, Motivation and Teambuilding.

Continuous Improvement (10%): Training will be offered to all occupations and focus on the reorganization of processes and procedures to improve drought-related efficiencies. Training topics include Kaizen, 5S, Lean Manufacturing, Problem Solving and Process Improvements.

Commitment to Training

Butte-Glenn College 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 varies by participating employer, is both job specific and companywide, and includes new hire orientation, sexual harassment prevention, best practices, first-aid and legal compliance.

High Unemployment Area

Some trainees may work in a High Unemployment Area (HUA) with unemployment exceeding the state average by 15%. Butte-Glenn College is requesting a wage modification for the 5 trainees in Job Number 2 and 15 trainees in Job Numbers 4 and 5, from $15.07 to $11.30 per hour.

Impact/Outcome

Drought training is expected to improve water usage efficiencies, increase crop yields and train farmers on drought resistant crops. After the completion of training, farmers will be able to use less water to produce the same amount of crops. With farms producing at the same capacity, it will prevent the loss of jobs in the Northern California region.

Marketing and Support Costs

Butte-Glenn College is requesting 20% support costs to assist in the recruitment, employer outreach, and assessment of employer-specific job requirements, as allowed under the RESPOND pilot.

An extensive needs assessment was completed by CITD, in which over 250 businesses in the 10 county Northern California regions completed assessments. The assessment uncovered that many of the exports are agricultural-related products and that there is substantial need for businesses to increase their exports.

Marketing is done through online newsletters, seminars, social media, local press, utilizing partner's networks, personal contacts, telephone calls, and emails. As a community college, Butte-Glenn College has formed partnerships with Workforce Investment Boards, Workforce Investment Agencies, regional Economic Development Centers, The US Small Business Administration, and Small Business Development Centers. The relationship between Butte-

Glenn College and these agencies assists in the bridge between education and industry. This will allow Butte-Glenn College to reach even more potential participating employers.

Trainer Qualifications

Butte-Glenn College and CITD subject matter experts will deliver training. Experienced trainers who work for participating employers may also provide some training.

Training Coordinator

Butte-Glenn College has contracted with CITD to assist with need assessments, marketing, training developing, obtaining qualified trainers, scheduling, class handouts, and ensuring attendance is logged on ETP rosters.

Tuition Reimbursement

Butte-Glenn College 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.

PRIOR PROJECTS

The following table summarizes performance by Butte-Glenn College under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0252	Chico	2/1/13 – 1/31/15	$287,764	$182,161 (63%)

The requested funding of $117,660 under this proposal is below the earned amount of $182,161 of the Core funding Agreement.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 Job Numbers 1, 2 & 5
8-60 Job Numbers 3 & 4

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Fundamentals
- Business Writing
- Collaboration
- Conflict Resolution
- Creative Marketing
- Cultural Aspects, Negotiations and Awareness
- Customer Relationship Management
- Communication Styles
- Cost Control
- Dealing with Difficult People
- Finance and Banking
- Financial Analysis
- Foreign Relations and Legal
- International Marketing, Shipping and Planning
- Leadership
- Leveraging Multiple Funding Sources
- Logistics and Documentation
- Marketing/Sales Techniques
- Negotiating
- Operational Skills
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Retaining Customers
- Relationship Building
- Strategic Planning
- Time Management

COMMERCIAL SKILLS

- Agriculture Equipment Obsolescence and Replacement
- Soil, Plant and Water Relationships
- Pipeline Hydraulics I
- Pipeline Hydraulics II
- California Drought Overview
- Cattle and Livestock Management
- Crop Irrigation Design
- Crop Rotation
- Drip/Micro Irrigation Design
- Drought-Related Landscape Design
- Drought-Related Urban Design
- Drought-Related Rural Design
- Drought Resistant Crops
- High Desert Water Management

- Irrigation Scheduling, Salinity and Drainage
- Irrigation Systems
- Irrigation Management
- Landscape Sprinkler Design
- Pesticide Application in Drought Conditions
- Pumps
- Soil Management
- Tailwater Return Systems
- Water Conservation
- Water Management
- Water Recycling
- Water Technologies
- Water Transfer Supply
- Waste Water Treatment Design

CONTINUOUS IMPROVEMENT

- Kaizen
- 5S
- Lean Manufacturing
- Process Improvement
- Production Operations/Workflow
- Process Improvement
- Project Management
- Problem Solving and Decision Making
- Process Capability

LITERACY SKILLS

- Vocation English as Second Language:
  - Basic English Language Skills
  - Reading/Comprehension
  - Basic Mathematics

MANAGEMENT SKILLS (Managers/Owners Only)

- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership
- Motivation
- Supervisor Skills
- Teambuilding
- Essential Skills for a New Supervisor

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Numbers 1, 2 & 5 regardless of the method of delivery. Reimbursement is capped at 60 total training hours per trainee in Job Numbers 3 & 4, regardless of the method of delivery.

Participating Employers in Retrainee
Multiple Employer Contracts

Company: 4 Corner Growers LLC

Address: 9051 Aguas Frias Rd.

City, State, Zip: Chico, CA 95928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

Company: Agra Trading LLC

Address: 60 Independence Circle

City, State, Zip: Chico, CA 95973

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: Alternative Energy Systems

Address: 13620 California Hwy. 99

City, State, Zip: Chico, CA 95973

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 34

Total # of full-time company employees in California: 34

Company: Bell-Carter Olive Company

Address: 1012 Second St.

City, State, Zip: Corning, CA 96021

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 250

Total # of full-time company employees in California: 250

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Betagna Orchards

Address: 3329 Hegan Lane

City, State, Zip: Chico, CA 95928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 10

Total # of full-time company employees in California: 10

Company: Bertagna Son Kissed Vineyards

Address: 3363 Hegan Lane

City, State, Zip: Chico, CA 95928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Burnisini Vineyards

Address: 19535 Hammers Ln.

City, State, Zip: Cottonwood, CA 96022

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Butte Hulling & Drying

Address: 557 Ord Ranch Rd.

City, State, Zip: Gridley, CA 95948

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Butte View Olive Company

Address: 2950 Louis Ave.

City, State, Zip: Oroville, CA 95966

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Chambers Oil

Address: 501 Miller Ave.

City, State, Zip: Chico, CA 95928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Chico Nut Company

Address: 2020 Esplanade

City, State, Zip: Chico, CA 95926

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 30

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

Company: Chico Sprinkler Inc.

Address: 2 Three Sevens Lane

City, State, Zip: Chico, CA 95973

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Compton Enterprises

Address: 2434 Dayton Rd.

City, State, Zip: Chico, CA 95928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: Cross Petroleum

Address: 3560 South Market St.

City, State, Zip: Redding, CA 96001

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 9

Total # of full-time company employees in California: 9

Company: Dayton Road Walnut Hulling & Drying

Address: 3101 Dayton Rd.

City, State, Zip: Chico, CA 95928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Deseret Farms

Address: 6100 Wilson Landing Rd.

City, State, Zip: Chico, CA 95973

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 30

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

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Durham Pump

Address: 2313 Durham Dayton Hwy.

City, State, Zip: Durham, CA 95938

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 30

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

Company: Fruit Growers Lab

Address: 563 E. Lindo Ave.

City, State, Zip: Chico, CA 95926

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: Grey Fox Vineyards

Address: 90 Greyfox Lane

City, State, Zip: Oroville, CA 95966

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Happy Orchards, Inc.

Address: 8165 White Oak Dr.

City, State, Zip: Durham, CA 95938

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Irrigate.net

Address: 1770 Serenity Way

City, State, Zip: Chico, CA 95928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Keyawa Orchards

Address: 3230 California 35

City, State, Zip: Glenn, CA 95943

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 30

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

Company: La Rocca Vineyard

Address: 12360 Doe Mill Rd.

City, State, Zip: Forest Ranch, CA 95942

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 8

Total # of full-time company employees in California: 8

Company: Llano Seco Rancho

Address: 8369 Hugh Baber Ln.

City, State, Zip: Chico, CA 95928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Lodestar Olive Oil

Address: 3719 Foothill Blvd.

City, State, Zip: Oroville, CA 95966

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: Lodi Pump & Irrigation

Address: 1301 Armstrong Rd.

City, State, Zip: Lodi, CA 95242

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Micheli Farms

Address: 6005 Hwy. 99

City, State, Zip: Live Oak, CA 95953

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 14

Total # of full-time company employees in California: 14

Company: Roney Land Cattle Company

Address: 515 Roney Trail

City, State, Zip: Chico, CA 95973

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Tehama County Farm Bureau

Address: 275 Sale Ln.

City, State, Zip: Red Bluff, CA 96080

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: The Olive Grove Nursery

Address: PO Box 659

City, State, Zip: Oroville, CA 95968

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Tozier Ranch

Address: 2401 Flag Canyon Rd.

City, State, Zip: Oroville, CA 95965

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Wil-ker-son Ranch and Packing Co.

Address: 661 E. Evens Reimer Rd.

City, State, Zip: Gridley, CA 95948

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

AB118

Training Proposal for:

Sacramento Area Regional Technology Alliance

Agreement Number: ET15-0807

Panel Meeting of: June 26, 2015

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

PROJECT PROFILE

Contract Attributes:	AB118 (Alt Funds) Priority Rate Retrainee SB <100	Industry Sector(s):	Manufacturing Biotechnology/Life Sciences Green Technology Retail Priority Industry: ☒ Yes ☐ No
Counties Served:	Butte, El Dorado, Madera, Nevada, Placer, Sacramento, San Joaquin, Solano, Sutter, Yolo, Yuba	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL

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

Program Costs	+	Support Costs	=	Total ETP Funding
$344,400		$23,880 8%		$368,280

In-Kind Contribution:	50% of Total ETP Funding Required	$400,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Continuous Improvement	240	8-200	0	$770	$15.07
				Weighted Avg: 40			
2	Retrainee SB<100 Priority Rate	Business Skills, Commercial Skills, Continuous Improvement	165	8-60	0	$1,112	$15.07
				Weighted Avg: 40			

Minimum Wage by County: $15.75 per hour in Sacramento County and $15.07 per hour in Butte, El Dorado, Madera, Nevada, Placer, Solano, Sutter, Yolo and Yuba counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Automotive Parts Staff		40
Automotive Technician		100
Engineer I		5
Engineer II		5
Shop Lead		15
Customer Service Representative		65
Fleet Maintenance Staff		40
Sales Staff		55
Marketing Staff		15
Financial Analyst		15
Production Staff		5
Senior Production Staff		5
Manager I		10
Manager II		6
Supervisor I		15
Supervisor II		9

INTRODUCTION

Founded in 2001, the Sacramento Area Regional Technology Alliance (SARTA) (http://sarta.org/) is a non-profit, membership-based organization, established to foster economic and entrepreneurial growth in the Sacramento region. SARTA focuses on accelerating the growth and development of companies within the nine-county Sacramento region including Butte, El Dorado, Nevada, Placer, Sacramento, Solano, Sutter, Yolo and Yuba counties. Multiple programs are operated by SARTA to grow businesses in the Agricultural Technology Industry), Clean Technology Industry (CleanStart), Bioscience Industry (MedStart), and Entrepreneurial Development.

This proposal is geared towards businesses participating in SARTA's MedStart and CleanStart programs. SARTA's charter allows their services to be delivered statewide and participating employers are being recruited outside of their normal operating area. Employers in the core group are primarily bioscience companies that convert agricultural waste to energy and produce equipment to be used in alternative fuels production; local municipalities transforming their transportation fleet to alternative fuel vehicles; and car dealerships that sell electric (EV), hybrid and compressed natural gas (CNG) vehicles.

Need for training

The alternative fuel industry is expanding as demand for products has steadily increased with the heightened emphasis on clean, renewable energy. Alternate fuel vehicles and equipment are consistently changing and upgrading. Trainees in all sectors of the alternative fuel industry are in need of updated training. SARTA has developed a training program that will improve worker knowledge within this industry.

To improve the number of alternative fuel vehicles sold at dealerships, sales staff requires training in product knowledge so they can speak confidently on options. As well because EV and hybrid vehicle systems differ from traditional gas-operated automobiles service staff require training to properly diagnose and repair alternative fuel vehicles. Participating employers in the bioscience industry have requested to receive continuous improvement training to improve energy production and improve production efficiencies. Finally, departments within local municipalities will receive training in the benefits of CNG vehicles. Fleet Maintenance Staff will also require training on the diagnosis and repair of CNG vehicles.

AB118

This proposal will be funded under the AB 118 Training Program created in FY 2009-10. The AB 118 Program is administered by ETP in partnership with the California Energy Commission (CEC).

The overall goal of the AB 118 Program is to support a transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies. There is no expenditure of Employment Training Tax funds for the AB 118 Program. Public entity employers are eligible to participate, such as city and county regional transit authorities.

Training is focused on job skills for a skilled workforce to produce and distribute new alternative fuels and design, construct, install, operate, service and maintain new fueling infrastructure and vehicles.

Alternative Fuel is defined as any fuel other than the traditional selections, gasoline and diesel from petroleum sources, used to produce energy or power. Examples of alternative fuels are:

bio-diesel, ethanol, methanol, electricity, propane, compressed or liquid natural gas, and hydrogen.

PROJECT DETAILS

Training Plan

Trainees will receive class/lab and/or E-Learnings training in the following:

Business Skills (10%): Training will be delivered to all occupations. AB 118 training will focus on all aspects of the product from the marketing stage through financing and service. In addition, workers will receive training on asset allocation to alternative fuel research and strategic goals. Training includes Biofuel Sales and Marketing, EV/Hybrid Marketing and Sales Techniques, Product Knowledge, Fleet Conversion Finance, Planning and Organization and Strategic Planning.

Commercial Skills (70%): Training will be delivered to all occupations. Car dealership training will focus on the operation and service of EV/Hybrid vehicles; municipal staff's training will focus on CNG vehicle maintenance and service; bioscience staff will receive training on the different types of biofuels and their production processes. Topics includes Charging an EV, Charging Network Overview, CNG Overview, CNG Engine Maintenance, Customer Benefits of an EV, Hybrid or CNG Vehicle, EV System Diagnosis and Service, Hybrid System Overview and Operation, Hybrid Maintenance Transmission Overview and Operation and Type of Biofuels.

Continuous Improvement (20%): Training will be delivered to all occupations. This training will focus on bioscience companies on ways to improve the biofuel production process. Other participating employers will have training to improve processes within their industry. Topics include Lean Manufacturing, Biofuel Equipment Operation, Biofuel Manufacturing Practices, Process Improvement, Troubleshooting, Anaerobic Digester Biofuel Process Control, and Project Requirements Analysis and Specifications.

Commitment to Training

SARTA represents that ETP funds will not displace the existing financial commitment to training for participating employers. Safety training is provided in accordance with all pertinent requirements under state and federal law. Training varies by participating employer, is both job specific and companywide, and includes mandatory trainings such as new hire orientation, sexual harassment prevention, best practices, first-aid, and legal compliance.

High Unemployment Area

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

Marketing and Support Costs

SARTA is requesting 8% support costs to assist with recruitment, employer outreach, and assessments of employer-specific job requirements.

Marketing is done through conferences, mixers, events, personal contacts, telephone calls, print articles, emails, and social media. In addition, SARTA has contracted with JPMA Financial, Inc. (JPMA) to complete training need assessments and develop the training plan. Staff recommends the 8% support costs.

Training Coordinator

JPMA has also been retained to schedule training, retain trainers, and create class curriculums. SARTA has two staff members to assist JPMA with these responsibilities. Sierra Consulting Services has been retained for overall project administration.

Impact/Outcome

Alternative fuel training will improve the job specific knowledge of participating employers. Employees will be able to work more confidently, efficiently and safer in regards to alternative fuel vehicles and alternative fuel energy products. With increased knowledge, the sale and use of alternative fuel and alternative fuel vehicles will increase in California.

Active Contract

This is SARTA's second ETP Agreement. SARTA has an active contract under the RESPOND/Drought program, running from March 2, 2015 to March 1, 2017. Of an estimated 250 trainees, none have been enrolled and none have received the minimum hours of training. SARTA is in the midst of obtaining the trainee's personnel information from their participating employers so that enrollment may be completed.

Tuition Reimbursement

SARTA 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

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

JPMA also assisted with development of this proposal for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

SARTA has a partnership with Sacramento Municipal Utility District (SMUD) to provide Alternate Fuel training. Training will be funded by SMUD and provided to Sacramento area car dealerships. Each trainee will receive between 1 and 2 hours of SMUD-funded training. ETP training will build on the training provided by SMUD.

Guy Hall of Granite Bay will provide training in Business and Commercial Skills.
George Parrott of Granite Bay will provide training in Commercial Skills.
Karla Nelson with JPMA of Rocklin will provide training in Business Skills.

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 Job Number 1
8-60 Job Number 2

Trainees may receive any of the following:

BUSINESS SKILLS

- Biofuel Sales and Marketing
- Customer Relationship Management
- Communication Styles
- EV/Hybrid Finance
- Fleet Conversion Finance
- EV/Hybrid Marketing and Sales Techniques
- Negotiating
- Planning and Organization
- Product Knowledge
- Strategic Planning
- Collaboration
- Leadership

COMMERCIAL SKILLS

- Assisting with EV, Hybrid and HOV forms
- Charging an EV
- Charging Network Overview
- Configure Supporting Applications
- Compressed Natural Gas (CNG) Overview
- CNG Vehicle Options
- CNG Infrastructure
- CNG Engine Maintenance
- Customer Benefits of an EV, Hybrid or CNG Vehicle
- Electricity Measurement
- EV/Hybrid Market Overview
- EV/Hybrid Cost of Ownership and Savings
- EV/Hybrid Price Differences and Comparisons
- EV Introduction and Safety, High Voltage Disable Procedure
- EV Power Electronics, Transmission, Support Systems
- EV Systems Diagnosis and Service
- EV Transmission Diagnosis and Service
- EV Battery Diagnosis and Service
- Fuel Efficiency Terms: Miles/Kilowatt Hour and MPG
- Successful EV/Hybrid Test Drive Strategy
- Home Charger Products and Options
- Hybrid Diagnosis and Repair
- Hybrid Battery System Overview and Operation
- Hybrid Transmission Overview and Operation
- Hybrid Supporting Systems Overview and Operation
- Hybrid Maintenance Safety
- Hosting Tutorials and/or Workshops for New EV and Hybrid Owners
- Operational Skills

- Types of Biofuels
- Types of Plugin Vehicles
- Types of Hybrid Vehicles
- Diamond Lane Options

CONTINUOUS IMPROVEMENT

- 5s
- Anaerobic Digester/Biofuel Assembly Process Control
- Anaerobic Digester/Biofuel Assembly Procedures
- Changeover Procedures
- Cross-Training in Biofuel Production & Equipment
- Biofuel Equipment Operation
- Kaizen
- Lean Manufacturing
- Biofuel Manufacturing Practices
- Process Capability
- Process Improvement
- Problem Solving and Decision Making
- Production Operations/Workflow
- Project Management
- Project Requirements Analysis and Specifications
- Troubleshooting
- Production Operations

E-Learning Hours

8-200 Job Number 1
8-60 Job Number 2

BUSINESS SKILLS

- Biofuel Sales and Marketing
- Customer Relationship Management
- Communication Styles
- EV/Hybrid Finance
- Fleet Conversion Finance
- EV/Hybrid Marketing and Sales Techniques
- Negotiating
- Planning and Organization
- Product Knowledge
- Strategic Planning

COMMERCIAL SKILLS

- Assisting with EV, Hybrid and HOV forms
- Charging an EV
- Charging Network Overview
- Configure Supporting Applications
- CNG Overview
- CNG Vehicle Options
- CNG Infrastructure
- CNG Engine Maintenance
- Customer Benefits of an EV, Hybrid or CNG Vehicle
- Electricity Measurement
- EV/Hybrid Market Overview

- EV/Hybrid Cost of Ownership and Savings
- EV/Hybrid Price Differences and Comparisons
- EV Introduction and Safety, High Voltage Disable Procedure
- EV Power Electronics, Transmission, Support Systems
- EV Systems Diagnosis and Service
- EV Transmission Diagnosis and Service
- EV Battery Diagnosis and Service
- Fuel Efficiency Terms: Miles/Kilowatt Hour and MPG
- Successful EV/Hybrid Test Drive Strategy
- Home Charger Products and Options
- Hybrid Diagnosis and Repair
- Hybrid Battery System Overview and Operation
- Hybrid Transmission Overview and Operation
- Hybrid Supporting Systems Overview and Operation
- Hybrid Maintenance Safety
- Hosting Tutorials and/or Workshops for New EV and Hybrid Owners
- Operational Skills
- Types of Biofuels
- Types of Plugin Vehicles
- Types of Hybrid Vehicles
- Diamond Lane Options

CONTINUOUS IMPROVEMENT

- 5s
- Anaerobic Digester Biofuel Assembly Process Control
- Anaerobic Digester/Biofuel Assembly Procedures
- Changeover Procedures
- Cross-Training in Biofuel Production & Equipment
- Biofuel Equipment Operation
- Kaizen
- Lean Manufacturing
- Biofuel Manufacturing Practices
- Process Capability
- Process Improvement
- Problem Solving and Decision Making
- Production Operations/Workflow
- Project Management
- Project Requirements Analysis and Specifications
- Troubleshooting
- Production Operations

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

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Sacramento Area Regional Technology Alliance CCG No.: ET15-0807

Reference No: 15-0176

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Altergy

Address: 140 Blue Ravine Rd.

City, State, Zip: Folsom, CA 95630

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 35

Total # of full-time company employees worldwide: 70

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

Company: CleanWorld

Address: 2330 Gold Meadow Way

City, State, Zip: Gold River, CA 95670

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 20

Total # of full-time company employees in California: 20

Company: Future Ford

Address: 650 Automall Dr.

City, State, Zip: Roseville, CA 95661

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: Micromidas

Address: 930 Riverside Pkwy. #10

City, State, Zip: West Sacramento, CA 95605

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 31

Total # of full-time company employees in California: 31

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Sacramento Area Regional Technology Alliance CCG No.: ET15-0807

Reference No: 15-0176

Company: Niello Group

Address: 1481 River Park Dr.

City, State, Zip: Sacramento, CA 95815

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 220

Total # of full-time company employees in California: 220

Company: Pacific Ethanol Incorporated

Address: 400 Capital Mall #2060

City, State, Zip: Sacramento, CA 95814

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 120

Total # of full-time company employees in California: 120

Company: Roseville Honda

Address: 230 Automall Dr.

City, State, Zip: Roseville, CA 95661

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 120

Total # of full-time company employees in California: 120

Company: Roseville Toyota

Address: 700 Automall Dr.

City, State, Zip: Roseville, CA 95661

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 95

Total # of full-time company employees in California: 95

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Abram Interstate Insurance Services, Inc.

Small Business ≤ $50,000

ET15-0458

Approval Date: May 27, 2015

ETP Regional Office: Sacramento **Analyst:** A. Greene

CONTRACTOR

- Type of Industry: Insurance

  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees

  California: 23

  Worldwide: 23

  Number to be trained: 23

  Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 5%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $17,204
- In-Kind Contribution: $17,646

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 Impr, Mgmt Skills	23	8-60	0-34	$748	$15.07
				Weighted Avg: 34			

- Reimbursement Rate: $22 SB Non-Priority
- County(ies): Placer
- Occupations to be Trained: Owner, Management Staff, Sales Staff, Admin Staff
- Union Representation: ☐ Yes ☒ No
- Health Benefits: $2.25 per hour

SUBCONTRACTORS

- Development Services: Sierra Consulting Services in Cameron Park assisted with development of this project for a flat fee of $1,407.
- 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 1996, Abram Interstate Insurance Services, Inc. (Abram) is a wholesale insurance brokerage located in Rocklin. The Company began its operations selling mobile home and equine insurance products. Abram expanded the business by partnering with A-rated insurance carriers such as Liberty Mutual, Lloyd's, Safeco and Travelers. The Company now offers a full range of personal, commercial, and agri-business insurance products to customers located throughout the United States.

Need for Training

Abram is continually offering new products to increase its broker base. In order to offer new products, Account Managers must be trained on the latest underwriting guidelines and systems while Sales Staff will require sophisticated product knowledge. Staff must also be knowledgeable in new industries (product lines and industry changes) for the Company to remain effective and competitive.

Additionally, training is needed on newly-purchased software: Customer Relationship Manager (CRM) system and Forms Capture Software. The CRM will allow Sales Representatives access to data while outside the office. Forms Capture Software will allow online data entry. Once training is complete, the software will allow Abram to efficiently collect data to quickly provide quotes to its customers.

Training Plan

Abram will provide 8-60 hours of Class/Lab, E-Learning and Computer-Based Training (CBT). Training will be delivered primarily by in-house staff at their facility in Rocklin.

Business Skills – Training will be offered to all occupations. Communication training will provide for the strengthening of skills to effectively interact with their broker base, insurance carriers, and internal customers. Product knowledge training will ensure employees are knowledgeable and up-to-date on product and industry changes. Topics also include marketing and sales techniques, time management, and strategic planning.

Computer Skills – Training will be offered to all occupations on software systems. In addition to the new CRM and Forms Capture Software, training topics will include Personal Lines Underwriting Rating Engine (P.U.R.E.) and Microsoft Office (Intermediate and Advanced only).

Continuous Improvement – Training will be offered to all occupations and will include cross-training to allow Abram to operate with minimal downtime when staff are absent. Other topics include leadership skills for frontline workers, problem-solving, and decision-making.

Management Skills – Training will be offered to Management Staff on Coaching and Team Building to recognize and minimize repeat performance failures and close gaps between current and desired performance outcomes. Other topics include leadership skills and essential skills for the new supervisor.

Modification

High workloads are expected and the demands of the job may not allow Abram sufficient time to complete the training in 1 year. Therefore, the Company is requesting a 2-year term.

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

- Behavior Style Strategies
- Business Performance
- Business Writing
- Communication Skills and Styles
- Conflict Resolution
- Customer Service
- Dealing with Difficult People
- Marketing and Sales Techniques
- Product Knowledge
- Strategic Planning
- Time Management

COMPUTER SKILLS

- Agent/Broker Portal
- Cross Training
- Customer Relationship Manager (CRM)
- Electronic Document Management
- Forms Capture Software
- Microsoft Office (intermediate and advanced only)
- Personal Lines Underwriting Rating Engine (P.U.R.E.)

CONTINOUS IMPROVEMENT

- Cross Training
- Leadership Skills for Frontline Workers
- Problem Solving and Decision Making
- Team Building

MANAGEMENT SKILLS *(For Managers and Supervisors Only)*

- Coaching and Team Building
- Essential Skills for the New Supervisor
- Leadership Skills

E-Learning Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Product Knowledge

COMPUTER SKILLS

- Customer Relationship Manager (CRM)
- Electronic Document Management
- Forms Capture Software

CBT Hours
0-34

BUSINESS SKILLS

- Communication Styles (1)
- Placement Decisions and Non-Traditional Property Markets (1)
- Selling to the Millennial Customer (1.5)
- Questioning Strategies (1)

COMPUTER SKILLS

- Microsoft Excel Formulas Made Easy (1)
- Word 2013 (intermediate or advanced only) (2)
- Secrets of Access (1)
- Outlook Fundamentals Level 2 (2)
- Outlook Fundamentals Level 3 (2)
- HTML Basics (1)

CONTINUOUS IMPROVEMENT

- California Homeowners Insurance Valuation (3)
- Insurance Fraud: Understanding the Issues (4)
- Risk Management (6)
- Essential Tips to Coordinate E-mail Marketing & Social Media (1)
- Ethics in the Property and Casualty Insurance Workplace (3)
- Improve Your Memory, Improve Your Productivity (1)
- Active Listening Skills to Improve Communication (1)

MANAGEMENT SKILLS *(For Managers and Supervisors Only)*

- How to Overcome Disruptive Work Style Differences (1)

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**.**

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

AB118

Training Proposal for:

Altec Industries, Inc.

Agreement Number: ET15-0806

Approval Date: May 14, 2015

ETP Regional Office: Sacramento **Analyst:** A. Greene

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee AB118 (Alt Funds)	Industry Sector(s):	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Solano	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 267	U.S.: 2,000	Worldwide: 3,000
Turnover Rate:	8%		
Managers/Supervisors: (% of total trainees)	9%		

FUNDING DETAIL

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

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$40,194		$0	$0		$40,194

In-Kind Contribution:	100% of Total ETP Funding Required	$45,060

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 AB118	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, Mnmgt. Skills, Mfg. Skills	77	8-200	0	$522	$15.07
				Weighted Avg: 29			

Minimum Wage by County: $15.07 for Solano County.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $0.57 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Staff		49
Service Technicians		6
Engineers		9
Managers		2
Supervisors		3
Sales Staff		5
Admin Staff		3

INTRODUCTION

Altec Industries, Inc. (Altec) has been doing business in California since 1987. Altec is wholly owned and held by Altec, Inc. headquartered in Alabama (www.altec.com). The Company provides products and services to electric utility, telecommunications and tree care providers. Altec products include digger derricks, pressure diggers, telescopic cranes and hotline-insulator washers. Although Altec operates nationwide, it has two facilities in California, located in Dixon and Pomona. Training will be provided only in Dixon to support a new product line.

Need for Training

In 2012, Altec increased the size of the Dixon manufacturing facility to expand its Green Fleet product line, which is designed to reduce impacts on the environment. The Dixon plant develops and produces utility truck bodies that use electric, hybrid, and compressed natural gas drive-train power systems.

Green Fleet uses advanced hybrid-electric technologies such as Jobsite Energy Management System (JEMS). JEMS is an integrated plug-in system that uses stored electrical energy to

power truck equipment such as aerial lifts and cabin climate controls, and to export power to hand tools and other electrical devices. The energy storage system is recharged by plugging into shore power or by the truck's internal combustion engine. This reduces vehicle fuel consumption, lessens noise pollution, and decreases carbon footprints and tailpipe emissions.

This will be Altec's third ETP-funded Agreement. Under this proposal, training is needed to expand employee skills in the development, production and servicing of the Green Fleet line. There will be an emphasis on Lean manufacturing processes. The Company is also in the process of expanding its fabrication shop, and training will be needed on new equipment being purchased later this year.

AB118

This proposal will be funded under the AB118 Training Program that was created in FY 2009-10. The AB118 Program is administered by ETP in partnership with the California Energy Commission (CEC).

The overall goal of the AB118 Program is to support a transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies. There is no expenditure of Employment Training Tax funds for the AB118 Program. Public entity employers are eligible to participate, such as city and county regional transit authorities.

Training is focused on job skills for a skilled workforce to produce and distribute new alternative fuels and design, construct, install, operate, service and maintain new fueling infrastructure and vehicles.

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

PROJECT DETAILS

Altec will provide 8-200 hours of Class/Lab training delivered by primarily in-house staff.

Business Skills (4%) – Training will be offered to Engineers and will include topics such as Conflict Management, Product Knowledge and Communication.

Commercial Skills (13%) – Training will be offered to Production Staff on topics such as JEMS, Sales Drawing Reading, Aerials Sentry Training and Digger Derrick Sentry Training.

Computer Skills (6%) – Training will be offered to all occupations. Topics include Basic Megabase and Diamond Logic training.

Continuous Improvement (21%) – Training will be delivered to all occupations to improve efficiencies in all areas. Training topics include Whole Process Overview Value Stream Map (VSM), Quality Systems, and Eight Disciplines of Problem Solving (8D)

Hazardous Materials (3%) - Training will be offered to all occupations required to work with or handle hazardous materials. The trainees will be taught how to work safely with hazardous products and how to handle chemical spills. This training will improve workplace safety and avoid the mishandling of hazardous materials.

Management Skills (3%) – Training will be offered to Supervisors, Managers and Manager Trainees on the topic of Leadership.

Manufacturing Skills (50%) – Training will be offered to Production Staff on topics such as Crane Operation, Level 1 Default Equipment Product Standards, and Basic Hose and Fitting.

Certified Safety Training

Hazardous Materials (HAZMAT)**.** This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Altec will receive up to 4 hours of refresher course 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 Altec's Corporate Environmental Manager.

Commitment to Training

In 2014, Altec invested $40,965 in employee training. The Company regularly provides training in safety and specific skill sets in the areas of continuous improvement, manufacturing processes and quality control expectations. The Company will continue with the same types of training with additions made based on continuous improvement needs.

Altec 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0447	Dixon	6/26/12-6/25/14	$130,960	$40,197 (31%)

Altec's poor performance of 31% was due to insufficient recordkeeping practices and lack of a formal training schedule. The Company has developed a formal process to record and upload attendance rosters and to integrate the training with work schedules. This proposal has been right-sized to the prior payment earned.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Communication
- Conflict Management
- Product Knowledge

COMMERCIAL SKILLS

- Aerials Sentry Training
- Basic Operations Per Stage
- Digger Derrick Sentry Training
- Forklift Certification
- General Jobsite Energy Management System
- Sales Drawing Reading
- Work Order Folder Training
- Work Order Interpretation

COMPUTER SKILLS

- Basic Megabase
- Diamond Logic

CONTINUOUS IMPROVEMENT

- Closed Loop Quality Failure Mode and Effects Analysis Control Plans
- Cost of Quality
- Effective Problem Solving
- Eight Disciplines of Problem Solving
- First Article Training
- Layered Process Unit
- Quality Systems
- Whole Process Overview Value Stream Map

HAZARDOUS MATERIALS

- Hazmat Training
- Spill Response Training

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Leadership

MANUFACTURING SKILLS

- Basic Hose and Fitting
- Basic Truck Operations
- Basic Unit Operation
- Body Door Adjustment
- Body Mounting
- Bolt Education
- Chassis Layout

- Corporate Electrical
- Crane Operation
- DEPS Component Installation
- Door Seal
- Electrical DEPS
- Electrical Schematic
- Fabrication Machine Operation
- Final DEPS
- Flats From Wrench Resistance
- Frame Drilling
- Grounding Blocks
- Huckbolt Training
- Hydraulic DEPS
- Level 1 Default Equipment Product Standards
- Major Component Lifting
- Oxy, Torch Operation, and Safety
- Part Identification and Equipment
- Post Mounted Spotlight Installation
- Touchup Training
- Trailer Plugs
- Travel Height Measurement
- Unit Manuals

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.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Andrew Furuseth School of Seamanship

Agreement Number: ET15-0467

Approval Date: June 8, 2015

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

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Transportation/Logistics Goods Movement Priority Industry: ☒ Yes ☐ No
Counties Served:	Statewide	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No The Sailors Union of the Pacific		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$32,400		$2,250 8%		$34,650

In-Kind Contribution:	50% of Total ETP Funding Required	$38,826

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, HazMat	25	8-200	0	$1,386	$16.44
				Weighted Avg: 72			

Minimum Wage by County: This is a statewide project; however, AFSS states that all retrainees will meet or exceed an hourly wage of $16.44 per hour.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Seaman		25

INTRODUCTION

The Andrew Furuseth School of Seamanship (AFSS) was founded in 1942 and is located at the Sailors' Union of the Pacific headquarters' building in San Francisco. AFSS is dedicated to the education and promotion of seamen in all phases of the maritime industry.

AFFS, the Sailor's Union of the Pacific (SUP), and its signatory maritime employers formed a Training Trust in 2002 for the purpose of providing training to eligible seamen. The Trust is governed by a Board of Trustees comprised of 2 labor and 3 management representatives. The SUP has collective bargaining agreements with six maritime companies, two of which are included in this proposal.

Trainees in this agreement operate vessels for the transportation of freight and passengers on the deep seas primarily out of California ports located in San Francisco, Oakland, Alameda, San Pedro and Long Beach. These goods are transported to foreign ports all over the world, including the Pacific Rim and the Middle East, as well as to domestic ports in Hawaii and other Pacific Coast locations. Trainees in the proposed Agreement crew commercial ships, tugs and barges engaged in maritime transport. Typical duties include bridge watch-standing, shipboard and shore side maintenance, emergency response on deck or in the engine areas, and stewarding onboard.

Eligibility

AFSS is eligible for ETP funding as a private school. Under Title 22, California Code of Regulations (CCR) 4426, private schools must be approved or certified by an independent third party whose review standards are satisfactory to the Panel.

The AFSS training program being funded by ETP is certified by an independent third party, the U.S. Coast Guard, whose review standards are satisfactory. As well, the training standards have been approved by the International Maritime Organization (IMO), a special branch of the United Nations created in 1959. These are the Standards of Training Certification and Watchkeeping (STCW) adopted by IMO and last revised in 2012. This determination is unique to the facts and circumstances of the school's training standards and certification.

PROJECT DETAILS

AFSS currently provides training in a variety of basic mariner skills required by the signatory employees; however, its current course offerings are not sufficient to meet the latest revision of the STCW. Furthermore, global competition and new technology require more specialized training than what AFSS has been able to offer. ETP-funded training will allow AFFS to offer certificated courses that will enable entry-level mariners to promote from the classification of Ordinary Seaman to Able Bodied Seaman and meet new regulatory requirements mandated by the U.S. Coast Guard. Without this training, limited opportunities will be available for these workers.

Employer Commitment

AFSS has submitted Participating Employer Certifications representing 100% of the trainee slots being requested.

Marketing and Support Costs

AFSS is requesting 8% in support costs to conduct ongoing assessments of employer-specific job requirements, identification of each trainee's skill deficits, and the development of individual training plans for each trainee. AFSS has one full-time training director dedicated to training assessments and scheduling of training.

TRAINING PLAN

Training in this proposal is 100% Center based. AFSS has subcontracted with Training Resources Limited, Inc. (TRL) located in San Diego to provide all of the ETP-funded training. TRL has extensive experience preparing Ordinary Seamen to advance to the classification of Able Bodied Seamen. Training is scheduled to begin upon ETP approval and will be coordinated by the AFSS training director.

Commercial Skills (75%) – Trainees will receive skill sets needed to advance from Ordinary Seaman to Able Bodied Seaman. Trainees will also receive skills needed to qualify for the STCW.

Hazardous Materials Handling (25%) – Training will provide trainees with the skills to contain oil and other hazardous material spills while at sea. Trainees will also be trained in marine pollution prevention and security and proper handling of explosive/combustible materials.

Commitment to Training

Training provided through AFSS will not displace the training that participating employers currently provide. Once trainees have completed the Able-Bodied Seamanship skills class/lab training, they will receive on-the-job training (on-the-job training not funded by ETP) on ship to put the new skill sets to practical use. ETP-funded training will upgrade skills and increase opportunities for advancement.

Impact/Outcome

Training delivered in the proposed ETP Agreement will enable Ordinary Seamen to promote to Able-Bodied Seamen and meet new regulatory requirements mandated by the U.S. Coast Guard, consistent with the STCW.

Retention Modification

For Seamen and Mariners, it is not customary for workers to be employed for a standard retention period of 90 consecutive days full-time with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Staff recommends using both the standard modification and the modified retention.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, AFSS 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.

PRIOR PROJECTS

AFSS has not had any prior projects within the last five years.

DEVELOPMENT SERVICES

California Labor Federation (Cal Fed) in Sacramento assisted with development of this proposal. [Note: Cal Fed is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $3,465. This fee does not affect the approved amount of funding.]

ADMINISTRATIVE SERVICES

AFSS also retained Strategy Workplace Communications to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Training Resources Limited, Inc. of San Diego will provide training for a fee of $55,500.

Exhibit B: Menu Curriculum

Class Lab Hours
8-200

Trainees will receive any of the following:

COMMERCIAL SKILLS

Navigational
- 100 – 1600 Ton Master
  - Towing Endorsement
- Vessel Traffic Rules of the Road
- Radar Observer (ARPA)
- Bridge Resource Management

STCW and MMD ratings
- Rating Forming Part of a Navigational Watch
- Rating Forming Part of an Engineering Watch
- Specially Trained Ordinary Seaman
- Able Seaman
- Qualified Member of the Engine Department (QMED)
- QMED Oiler
- QMED Fireman/Watertender
- QMED Pumpman
- QMED Machinist
- QMED Electrician
- QMED Junior Engineer

Tankerman Endorsement
- Tankerman Assistant
- Tankerman Person-in-Charge

Engineering
- Designated Duty Engineer (DDE 1000 through DDE 4000)
- Limited Engineer Licenses

Steward Department
- Sanitary Food Preparation and Culinary Skills
- Restaurant Hazard Communication

Small boat operations
- Basic boat handling
- Launching and recovery
- Search and Rescue

Safety Training
- Personal Safety and Social Responsibility
- Water Survival

Marlinspike Seamanship

- Knots
- Splicing Broken Lines and Wire Cables
- Tackle, Pulley and Sheaves
- Block and Tackle
- Ground Tackle

Military training

- Basics of Naval Explosive Hazard Course
- Explosive Material Handling
- Explosive Cargo Handling and Stowage
- Small Arms Training: Initial Qualification and Renewal
- Emergency Communication Equipment

Survival and Emergency Response training

- Survival Craft
  - Lifeboatman
  - Proficiency in Survival Craft
  - Automatic Electronic Defibrillator (AED)
  - Medical First Responder
- Fire Fighting
  - Advanced Firefighting
  - Basic Firefighting
- Shipboard Seamanship
  - Cargo Handling Equipment
    - Crane Training
    - Forklift Operator Training
    - Side Loader Operator Training
    - Special Forklift Training for Explosive Material Handling
    - Hand-Truck Operation and Safety
  - Cargo Stowage
  - Chemical, Biological and Radiological Equipment
  - Shipboard Damage Control Equipment
  - Anti-Terrorism and Anti-Piracy Procedures
  - Nautical and Marlinspike Terminology
  - Compass Types and Definitions
  - Vessel Types and Construction

HAZARDOUS MATERIALS

- Oil Spills
- Dangerous Chemicals
- Marine Pollution Prevention
- Security Training

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

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

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: AFSS	CCG No.: ET15-0467
Reference No: 14-0664	Page 1 of 1

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Matson Navigation Company

Address: 555 12th Street

City, State, Zip: Oakland, CA 94607

Collective Bargaining Agreement(s): Yes – Sailors Union of the Pacific

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

Total # of full-time company employees worldwide: 300

Total # of full-time company employees in California: 200

Company: Patriot Contract Services, LLC

Address: 1320 Willow Pass Road, Ste. 465

City, State, Zip: Concord, CA 94520

Collective Bargaining Agreement(s): Yes – Sailors Union of the Pacific

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

Total # of full-time company employees worldwide: 470

Total # of full-time company employees in California: 272

ET15-0467

Sailors' Union of the Pacific

TELEPHONE . . . . . (415) 777-3400
FAX . . . . . .(415) 777-5088
WEBSITE . . . . . www.sailors.org

BRANCHES . . . . PHONE
SEATTLE, 98199 • 4269 22nd AVE. W. • (206) 467-7944
WILMINGTON, 90744 • 533 N. MARINE AVE. • (310) 835-6617
HONOLULU, 96813 • 707 ALAKEA ST. • (808) 533-2777
GUNNAR LUNDEBERG • PRESIDENT/SECRETARY-TREASURER

HEADQUARTERS: 450 HARRISON STREET
SAN FRANCISCO, CALIFORNIA 94105

March 16, 2015

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

Dear Panel Members:

This letter is to advise you that the Sailor's Union of the Pacific (SUP) supports the Andrew Furuseth School of Seamanship's ETP application. We have participated in meetings to understand how this training program would expand our members' skills to meet newly developed maritime industry standards. We have met regarding the ETP training schedule, the training curriculum and the recruitment plan for our members.

I fully support the ETP-funded training program and believe that the training will help SUP members meet the skills needed to position them for advancement and secure employment in the maritime industry. Should you have any other questions, please contact me at (415) 777-3400.

Sincerely,

DAVE CONNOLLY
Vice-President

ope-3-afl-cio (146)

DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

Avanir Pharmaceuticals, Inc.

Agreement Number: ET15-0477

Approval Date: June 8, 2015

ETP Regional Office: San Diego **Analyst:** K. Campion

PROJECT PROFILE

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

Number of Employees in:	CA: 280	U.S.:2,339	Worldwide: 28,288
Turnover Rate:	3%		
Managers/Supervisors: (% of total trainees)	14%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$64,980		$0	$0		$64,980

In-Kind Contribution:	100% of Total ETP Funding Required	$160,679

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr.	87	8-200	0-25	$540	$16.25
				Weighted Avg: 30			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Impr.	20	8-200	0-25	$900	$16.25
				Weighted Avg: 45			

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

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Corporate Support Staff		32
Engineering/Production Staff		20
Research & Development Staff		15
Sales/Marketing Staff		10
Manager		10
JOB NUMBER 2		
Corporate Support Staff		5
Engineering/Production Staff		3
Research & Development Staff		2
Sales/Marketing Staff		5
Manager		5

INTRODUCTION

Founded in 1988 and located in Aliso Viejo, Avanir Pharmaceuticals, Inc. (Avanir) is a subsidiary of Otsuka America, Inc. The Company is a biopharmaceutical manufacturer focused on acquiring, developing, and commercializing novel therapeutic products for the treatment of central nervous system disorders (www.avanir.com). The Company's primary product is NUEDEXTA,

the only Federal Drug Administration approved treatment for pseudobular affect (PBA). PBA occurs secondary to a variety of otherwise unrelated neurological conditions and is characterized by involuntary, sudden, and frequent episodes of laughing and/or crying.

PROJECT DETAILS

Avanir is in the process of studying the clinical use of NEUDEXTA in other mood/behavior disorders and movement disorders, including the potential treatment of agitation in patients with Alzheimer's disease and symptoms related to Parkinson's disease. The Company is also in the process of researching and developing other new products in order to keep pace with the rapid growth and change in the pharmaceutical industry.

In addition to these challenges, Avanir has grown at a very rapid pace over the last 10 years, from 20 employees in California in 2004 to 280 at the end of 2014, creating more complexity within the Company's operations. The growth and expansion of Avanir's workforce has created the need to increase workforce capability, teamwork, efficiency, and collaboration across the entire organization. Avanir must also leverage the capabilities of new/upgraded systems.

Retrainee - Job Creation

In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees (higher reimbursement rate and a lower post-retention wage). Trainees must be hired within the three-month period prior to Panel approval or during the term of the contract.

To keep pace with technology and continue to compete in the pharmaceutical industry, Avanir must expand its existing business capacity by adding newly-hired employees to research and develop new products. The Company hired 59 full-time workers in 2014 and projects to add approximately 90 new employees in 2015-2016, of whom 20 are included in this proposal (Job number 2). Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

The majority of the training will be delivered via class/lab and is scheduled to start immediately upon Panel approval. A small percentage of training will be delivered via Computer-Based Training (CBT) as a precursor and/or supplement to Class/Lab training.

Business Skills (20%) – This training will be provided to all occupations. Trainees will be able to perform their job functions and provide improved and consistent customer service/support through sales/marketing, presentation skills, and customer service/support skills.

Commercial Skills (30%) – This training will be provided to Research & Development Staff and Engineering/Production Staff. Training includes Clinical Trials Processes & Procedures, Clinical Research Support Skills, Drug Research and Development Skills, and product knowledge. Training will enable frontline workers to improve research and development.

Computer Skills (10%) – All occupations will be provided Computer Skills training on systems and computer applications that are applicable to each trainee's job roles and responsibilities.

Continuous Improvement (40%) – This training will be provided to all occupations. In a continued effort to provide the best quality and service to its customers, this training will focus on Critical Thinking Skills, Leadership Skills, Process/Performance Improvement and Management Skills, Project Management Skills, and Team Building.

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. Avanir estimates it will spend $400K in 2015/2016 for training that includes new employee orientation, anti-harassment/diversity, basic computer skills, and basic job skills training. ETP funding will allow Avanir to provide new and additional skills to its incumbent and newly hired employees as well as to expand its current training program to meet the needs of a rapidly growing organization.

Avanir has a dedicated Senior Director of Learning and Talent Development, who will oversee this training project and be responsible for managing the scheduling, delivery and documentation of training. ETP project administration will be provided by a subcontractor.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Avanir retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of $6,800.

ADMINISTRATIVE SERVICES

Avanir also retained TFP to perform administrative services in connection with this proposal for an amount not to exceed 11.5% 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 Skills & Relationship Building
- Customer Service/Support Skills
- Presentation Skills
- Sales/Marketing Skills

COMMERCIAL SKILLS

- Clinical Trials Processes & Procedures
- Clinical Research Support Skills
- Drug Research and Development Skills
- International Business Practices/Doing Business in Other Countries
- Product Knowledge Skills

COMPUTER SKILLS

- Intermediate/Advanced Microsoft Office
- Halogen Performance/Learning Management Software System

CONTINUOUS IMPROVEMENT

- Change Management
- Coaching/Feedback Skills
- Creative/Critical Thinking Skills
- Delegating Authority
- Effective Meetings
- Goal Setting
- Leadership Skills/Leading Teams
- Process/Performance Improvement and Management
- Project Management Skills
- Team Building Skills
- Time Management

CBT Hours

0 – 25

BUSINESS SKILLS

- Balance Conflicting Customer Priorities (30 minutes)
- Being Consistent with Company Values (30 minutes)
- Brand and Promote Your Project (30 minutes)
- Build your Network (30 minutes)
- Building Skills and Capabilities (30 minutes)
- Building Trust with Others (30 minutes)
- Cautious Communication Style (30 minutes)
- Communicate Clear and Concise Messages (30 minutes)

- Communicating Positive Expectations (30 minutes)
- Connecting Work to Company Objectives (30 minutes)
- Connecting Work to the Organization (30 minutes)
- Control vs. Influence (30 minutes)
- Create a Conflict Management Culture (30 minutes)
- Create a Vision Branding Statement (30 minutes)
- Creating a Conflict Resolution Mindset (30 minutes)
- Creating Accountability for Business Results (30 minutes)
- Creating Challenging Work (30 minutes)
- Creating the Mindset for Your New Role (30 minutes)
- Creating Work Autonomy (30 minutes)
- Developing an Attitude to Learn (30 minutes)
- Dominant Communication Style (30 minutes)
- Handling Customer Complaints (30 minutes)
- How Employees Support Organization Goals (30 minutes)
- Inspiring Communication Style (30 minutes)
- Keeping Customers Informed (30 minutes)
- Know and Meet Customer Needs (30 minutes)
- Learn From a Conflict Management Expert (30 minutes)
- Nonverbal Communication (30 minutes)
- Personal Skill Development Plan (30 minutes)
- Resources and Customer Needs (30 minutes)
- Seven Components of Great Presentations (30 minutes)
- Speaking Freely with Others (30 minutes)
- Struggling to Meet Commitments (30 minutes)
- Supportive Communication Style (30 minutes)
- The Right Level of Challenge (30 minutes)
- Understand Customer Needs (30 minutes)

CONTINUOUS IMPROVEMENT

- Accelerate Goal Achievement (30 minutes)
- Accelerate the Acceptance of Organization Change (30 minutes)
- Acting with Appropriate Speed to Problems (30 minutes)
- Align Resources to Strategic Priorities (30 minutes)
- Analyze Key Experiences for Lessons Learned (30 minutes)
- Analyze the Pros and Cons of Key Decisions (30 minutes)
- Ask Your Boss for Feedback (30 minutes)
- Balance Your Leadership and Employee Roles (30 minutes)
- Be a Powerful and Inspirational Role Model (30 minutes)
- Become a Reliable Leader with Integrity (30 minutes)
- Capture and Share Best Practices (30 minutes)
- Contributing to the Organization Strategy (30 minutes)
- Diagnose Resistance to Change (30 minutes)
- Discussing Your New Leadership Role (30 minutes)
- Ensure Strategy Alignment (30 minutes)
- Feedback for Great Results (30 minutes)
- Four Types of Feedback (30 minutes)
- Giving Clear Work Priorities (30 minutes)
- Giving Employee Feedback (30 minutes)

- Goal Setting at Three Levels (30 minutes)
- Help Groups Resolve Conflict (30 minutes)
- Helping Employees Manage Conflict (30 minutes)
- Identify All Outcomes of a Potential Decision (30 minutes)
- Improve the Feedback You Give Others (30 minutes)
- Improve the Quality of Feedback You Give (30 minutes)
- Increase Employee Innovation (30 minutes)
- Increase the Level of Challenge at Work (30 minutes)
- Increase Your Objectivity (30 minutes)
- Increase Your Personal Engagement (30 minutes)
- Inform and Inspire Your Team (30 minutes)
- Integrity Review (30 minutes)
- Know Your Skills and Gaps (30 minutes)
- Know Your Team's Experience and Background (30 minutes)
- Listening to Others' Ideas and Opinions (30 minutes)
- Manage Conflict with Others (30 minutes)
- Managing Team Resources (30 minutes)
- Maximizing Employee Talents (30 minutes)
- More Than One Solution (30 minutes)
- Motivation for Change (30 minutes)
- Project Teams Rely on Each Other (30 minutes)
- Receive Feedback From Your Employees (30 minutes)
- Reinforce Great Teamwork (30 minutes)
- Remove Yourself as a Source of Threat (30 minutes)
- Resources for Success (30 minutes)
- Seek Out the Ideas and Opinions of Others (30 minutes)
- Seeking Out Cutting Edge Ideas (30 minutes)
- Show Good Judgment Regarding Creative Ideas (30 minutes)
- Six Step Coaching Model (30 minutes)
- Skill Development Opportunities (30 minutes)
- Solving Problems in the Right Way (30 minutes)
- Sources of Feedback (30 minutes)
- Support Employee Development (30 minutes)
- Team Communication Feedback (30 minutes)
- Three Month Work Objectives (30 minutes)
- Understand the Expectations of a New Role (30 minutes)
- Use a Resource Management Agenda Item (30 minutes)
- Using an Employee's Best Skills and Abilities (30 minutes)
- Working with a Diverse Team (30 minutes)

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.

Panel Amendment #2 Proposal for:

BP Lubricants USA Inc.

Agreement Number: ET15-0160

Amendment Effective Date: June 3, 2015

Approval Date: June 3, 2015

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

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee	Industry Sector(s):	Manufacturing
Counties Served:	Contra Costa	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No	Priority Industry:	☒ Yes ☐ No
Current Contract Term:	July 7, 2014 to July 6, 2016	Substantial Contribution:	☐ Yes ☒ No

CURRENT FUNDING

Current Funding
$50,616

AMENDMENT FUNDING

Requested Funding	Total Funding
$39,672	$90,288

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	Continuous Impr, Mfg Skills	38	8-200	0	**$2,376**	$18.00
				Weighted Avg: **132**			

Minimum Wage by County: $16.25 per hour for Contra Costa County.

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

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

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

Wage Range by Occupation	
Occupation Title	Wage Range
Administrative Staff I	
Administrative Staff II	
Operator I	
Operator II	
Technician/Mechanic I	
Technician/Mechanic II	
Manager/Supervisor I	
Manager/Supervisor II	
Manager/Supervisor III	

INTRODUCTION

BP Lubricants USA Inc. (BP Lubricants) is an international corporation with operations in over 70 countries. The Company manufactures and distributes an extensive range of lubricants, from engine oils and brake fluids for automobiles, motorcycles, and lawn mowers to heavy duty lubricants for trucks, earthmovers and diggers, marine vessels, and industrial machines.

AMENDMENT DETAILS

The original requested amount was right-sized by staff due to poor prior performance on the previous contract. However, in eight months, BP Lubricants has already delivered and recorded 2,297 reimbursable hours, representing 82% of the contract amount. The Company is on target to reach 100% in earnings under the current funding amount by mid-July 2015. (See table below.) Therefore, the Company is requesting an increase in funding of $39,672 to restore the original training plan. This will increase the cost-per-trainee by $1,044, from $1,332 to $2,376.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARY OF PRIOR MODS/AMDS

- Amendment #1: Added Computer-Based Training (CBT) to broaden available training to meet the needs of the Company and its employees.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET15-0160	$50,616	07/07/2014-07/06/2016	38	0	0

There are 2,297 reimbursable hours entered in ETP Online Tracking for potential earnings of $41,346 (82% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to and in progress through July 2015, and this projection is supported by performance to date.

DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

C&H Sugar Company, Inc.

Agreement Number: ET15-0454

Approval Date: May 18, 2015

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

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Contra Costa	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Sugar Worker's Union Local #1 and Int'l Longshore & Warehouse Union Local #6		

Number of Employees in:	CA: 450	U.S.:450	Worldwide: 450
Turnover Rate:	6%		
Managers/Supervisors: (% of total trainees)	17%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$79,000		$0	$0		$79,000

In-Kind Contribution:	100% of Total ETP Funding Required	$80,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills, OSHA 10/30, HAZWOPER, PL-Manufacturing Skills	100	8-200	0	$630	$16.44
				Weighted Avg: 35			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills, OSHA 10/30, HAZWOPER, PL-Manufacturing Skills	40	8-200	0	$400	$13.70
				Weighted Avg: 20			

Minimum Wage by County: $16.44 for Job Number 1 and $13.70 for Job Number 2 for Contra Costa County.

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

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

Up to $1.44 for Job Number 1 and up to $0.70 for Job Number 2 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		5
Buyer		4
Transportation Coordinator		3
Sales Staff		5
Electrician		5
Welder		5
Millwright		5
Pipe Fitter		5

Chemist		5
Laboratory Staff		5
Engineer		5
Production Staff		15
Shipping Staff		15
Supervisor/Manager		18
Job Number 2:		
Administrative Staff		
Buyer		
Transportation Coordinator		2
Sales Staff		3
Electrician		2
Welder		4
Millwright		4
Pipe Fitter		2
Chemist		3
Laboratory Staff		3
Engineer		3
Production Staff		9
Shipping Staff		3
Supervisor/Manager		2

INTRODUCTION

C&H Sugar Company, Inc. (C&H Sugar) began refining pure cane sugar in Crockett, California in 1906. Today the Crockett facility produces over 700 thousand tons of cane sugar annually – more than 70 types, grades, and package sizes, including packaged consumer sugars as well as liquid and bulk granulated industrial-use cane sugars.

NEED FOR TRAINING

There has been a significant increase in demand for organically certified cane sugar and other natural sweeteners. For C&H to remain competitive and meet customer demands new processes must be instituted. Product development guidelines are being introduced throughout the organization from marketing and sales through production and shipping. During their last ETP Agreement, C&H Sugar determined that Continuous Improvement (Lean Practices) was a priority training need to eliminate wasteful activities and improve efficiencies. After successfully completing the Lean concept training, C&H Sugar is now ready to focus on other training needs.

Training is required throughout the organization on new products and unique production processes. This includes customized software systems. For example, C&H Sugar has also implemented Kronos Cloud Based Technology to ensure easy access to real-time information from anywhere in the world. The Company also integrated support systems into all aspects of the upgraded Customer Relationship Management (CRM) System, Applications, and Product

(SAP) systems. Business soft skills, SQF 200, and OSHA 10/30/40 will also be part of the training plan.

In addition, C&H Sugar will be replacing four of its Gantry cranes, which requires specialized training. With the implementation of the upgraded equipment the Company anticipates a 10% increase in productivity, and 25% quicker dock unloading time.

The proposed training will not duplicate courses previously offered, with the exception of new hires and/or advanced versions.

Retrainee - Job Creation

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

In this proposal, C&H Sugar has committed to hiring 40 new employees as shown in Job Number 2. C&H Sugar 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.

C&H Sugar is currently recruiting and plans to hire the new staff within the next 3-6 months resulting in an anticipated 10% increase in productivity with the four new Gantry cranes as well as a 3-5% expansion in the Company's customer base with the implementation of the new Organic Product line. The Organic Product line will be implemented in winter 2015.

PROJECT DETAILS

Training Plan

Business Skills (18%) – Training will be offered to all occupations to meet increased business demands, solve customer problems and identify how daily activities and decisions affect the customer perception and satisfaction. Training topics will include Frontline Decision Making and Problem Solving, Managing Change, Manager Forums, and Performance Management. Supervisors/Managers will also receive training in leadership skills upgrades.

Computer Skills (14%) – Training will be offered to all occupations and will enable the Company to increase integrity and reduction in rework. Training topics will include courses on CRM, Kronos Cloud Based Technology and SAP.

Manufacturing Skills (23%) – Training will be offered to Electrician, Welder, Millwright, Pipe Fitter, Chemist, Laboratory Staff, Engineer and Production staff to fully integrate the four new gantry cranes. Training topics will include Equipment Operations, Organic Products, Production Techniques, Sugar Refinery Advancements, Troubleshooting, Repair and Maintenance.

Continuous Improvement (20%) – Training will be provided to all occupations to support the Company's reputation of product quality and company reliability. Electrician, Welder, Millwright, Pipe Fitter, Chemist, Laboratory Staff, Engineer and Production Staff training will be emphasized to improve operating costs. Training topics will include HAACP, Quality Management and SQF 2000.

OSHA 10/30 (5%)

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

Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is also a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Productive Laboratory (Manufacturing Skills) (20%)

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, and special attendance rosters will be used to assist in monitoring.

PL training will be provided to Electrician, Welder, Millwright, Pipe Fitter, Chemist, Laboratory Staff, Engineer and Production Staff to supplement Class/Lab training. The delivery of PL training is necessary as trainees will encompass hands on demonstration of actual work. This training will focus on the trainee's competency of producing and the integrity of the end result. Training will include course topics that require the trainee's skills to be updated or in areas that C&H Sugar determines that quality must improve.

Trainees will use the following equipment in PL training: Gantry cranes, forklifts, trucks, production and packaging equipment. All PL training will take place onsite at the C&H Sugar facility in Crockett with a trainer-to-trainer ratio of 1:1. Electrician, Welder, Millwright, Pipe Fitter, Chemist, Laboratory Staff, Engineer and Production Staff will receive 60 hours of PL. These parameters are in keeping with the Panel's standards.

PL training will consist of actual work production on a singular scale. The trainer will review the materials and equipment required, discuss the process by which to produce the end result and will then perform all the tasks in a demo mode to create the end product. The trainer will then observe the trainee complete all the steps and produce the end product. Trainers, whether in-house or vendor, will be at the journey-level as an Electrician, Welder, Millwright, Pipe Fitter, Chemist, Laboratory Staff, or Engineer. After the successful completion of PL training, the trainer will "sign off" that the trainee has achieved competency.

Commitment to Training

C&H Sugar currently has an annual training budget of $50,000, which includes training such as state mandated safety training, new employee orientation and sexual harassment prevention training.

C&H Sugar 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by C&H Sugar under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0329	Crockett	04/02/2012 – 04/01/2014	$223,200	$68,775 (31%)

Upon execution of the prior Agreement, C&H Sugar hired a new Human Resources Manager, and made other management changes in this area. During the transition in management style, much of the training was not delivered or was not documented.

Since then, company-wide communication channels have been opened, such that the Vice President of Human Resources, Plant Manager and their Department heads are now closely involved with the training plan. C&H Sugar is confident the training plan will be successful with a goal of 100% performance.

Due to prior performance, the requested funding amount under this proposal has been right-sized to $79,000.

DEVELOPMENT SERVICES

C&H Sugar retained Sallyanne Monti Consulting in San Francisco to assist with development of this proposal for a flat fee of $3,500.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Frontline Decision Making and Problem Solving
- Manager Forums
- Performance Management
- Managing Change

COMPUTER SKILLS

- CRM – Customer Relationship Management
- SAP – Systems, Applications & Products
- Kronos Cloud Based Technology

CONTINUOUS IMPROVEMENT

- HAACP (Hazardous Analysis & Critical Control Points)
- SQF 2000 (Safe Quality Food)
- Quality Management

MANUFACTURING SKILLS

- Organics Products
- Equipment Operations
- Production Techniques
- Trouble-Shooting, Repair, and Maintenance
- Sugar Refinery Advancement

OSHA 10/30 Hours (OSHA Certified Instructor)
0-30

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

HAZWOPER Hours (Certified Instructor)
0-40

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

Productive Lab Hours (Ratio 1:1)

8 – 60 **EQUIPMENT OPERATIONS**

- ACT – White Centrifugal Operator
- Behind the Wall Forklift Drivers
- Belt gang Forklift Drivers
- Bemis Operator
- Bosch Operator
- Brown Carton Operator
- Brown Clear Pack Operator

- Bulk Products Operator
- CFO – Char Furnace Operator
- Drivert Operator
- Elba Operator
- FPR – Filter Press Operator
- Hesser Operator
- MHS – Melthouse Operator
- Milk Carton Operator
- RCT – Remelt Centrifugal Operator
- Rainbow Operator
- Raw Sugar Crane Operator
- Ropack Operator
- Specialty Forklift Drivers
- Velocriton Operator
- Von Gal Operator
- WST – Waste Station Operator

ORGANICS PRODUCTION

- LIG – Liquid gallery Operator
- EVP – Evaporators Operator

PRODUCTION TECHNIQUES

- Dock Clerks
- HSB – Head Sugar Boiler
- Sanitation Workers
- Shipping Clerk
- Stock Clerk
- Truck Foreman

SUGAR REFINERY ADVANCEMENTS

- GOP – Granulator Operator
- RSO – Refinery Syrup Operator
- RCL – Raw Clarifiers Operator
- RSB – Remelt Sugar Boiler
- SBL – Sugar Boiler
- SHO – Soft Sugarhead Operator
- SSB – Soft Sugar Boiler

TROUBLE-SHOOTING, REPAIR & MAINTENANCE

- ASRS Coordinators
- Belt Gang Foreman
- Drivert Packer
- Head Sugar Controller
- Powder Clear Pack Operator
- Powder Sugar Carton Operator
- Power Sugar Bulk Packer
- Pulverizer Technician
- PUO – Process Utility Operator
- Raw Sugar Foreman
- Soft Bulk Packer

- Sugar Controller
- Super Sack Packer
- Utility Foreman

E-Learning Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Frontline Decision Making & Problem Solving
- Managing Change
- Performance Management

COMPUTER SKILLS

- CRM - Customer Relationship Management
- SAPS – Systems, Applications & Products
- Kronos Cloud Based Technology

CONTINUOUS IMPROVEMENT

- HACCP (Hazardous Analysis and Critical Control Points)
- SQF 2000 (Safe Quality Food)
- Quality Management

MANUFACTURING SKILLS

- Equipment operations
- Organics Products
- Production Techniques
- Sugar Refinery Advancements
- Trouble-Shooting, Repair & Maintenance

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 60 hours per-trainee.

SUGAR WORKERS UNION LOCAL #1

641 Loring Avenue
P.O. Box 583
Crockett, CA 94525
(510) 787-1676
(510) 787-2788
FAX (510) 787-1776

INSTRUCTION FOR UNION:

1. KINDLY PRINT THIS LETTER ON YOUR UNION LETTERHEAD
2. SIGN THE LETTER
3. SCAN A COPY TO JILL.NOHL@asr-group.com
4. MAIL ORIGINAL TO

   Jill Nohl,
   Manager, Human Resources
   C&H Sugar Company, Inc.
   830 Loring Ave.
   Crockett, CA 94525

Today's Date

To Whom It May Concern:

This letter is to express our support of C & H Sugar, Inc.'s application for funding with the State of California Employment Training Panel.

We anticipate that this program will enable the company to upgrade employee skills. The company anticipates increased employee retention and product quality, enabling them to remain competitive while growing their business, leading to greater job creation and security.

This letter has been emailed to Jill Nohl, Manager Human Resources, via jill.nohl@chsugar.com .

Sincerely,

Your Name Richard Tacker
Your Title B/A -

Warehouse Union Local 6
INTERNATIONAL LONGSHORE & WAREHOUSE UNION
99 HEGENBERGER ROAD, OAKLAND, CA 94621-1485 • (510) 638-5605 • 1-800-864-8302 • FAX: (510) 638-3297

March 6, 2015

To Whom It May Concern:

This letter is to express our support of C&H Sugar, Inc.'s application for funding with the State of California Employment Training Panel.

We anticipate that this program will enable the company to upgrade employee skills. The company anticipates increased employee retention and product quality, enabling them to remain competitive while growing their business, leading to greater job creation and security.

This letter has been emailed to Jill Nohl, Manager Human Resources, via jill.nohl@chsugar.com.

Sincerely,

WAREHOUSE UNION LOCAL 6, ILWU
Corey Tacconi
Corey Tacconi, Business Agent

cc: Fred Pecker, Secretary Treasurer

CT:bb:cwa39521

DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

Carollo Engineers, Inc.

Agreement Number: ET15-0456

Approval Date: May 20, 2015

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

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Engineering Priority Industry: ☒ Yes ☐ No
Counties Served:	Contra Costa, Orange, Sacramento, Riverside, San Diego, Los Angeles, Placer, San Francisco, Santa Clara	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 224	U.S.: 586	Worldwide: 587
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	18%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$19,390		$0	$0		$19,390

In-Kind Contribution:	100% of Total ETP Funding Required	$19,390

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 Job Creation Initiative Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., OSHA 10/30, Hazwopper	10	8 - 200	0	$400	$13.00
				Weighted Avg: 20			
2	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., OSHA 10/30, Hazwopper	45	8 - 200	0	$342	$15.07
				Weighted Avg: 19			

Minimum Wage by County: Job Number 1(Job Creation): $12.33 for Riverside and Placer counties; $13.13 for Sacramento County; $13.28 for San Diego County; $13.31 for Los Angeles County; $13.35 for Orange County; and $13.70 for Contra Costa, Santa Clara and San Francisco counties

Job Number 2: $15.07 for Riverside and Placer counties; $15.75 for Sacramento County; $15.93 for San Diego County; $15.97 for Los Angeles County; $16.02 for Orange County; and $16.44 for Contra Costa, Santa Clara and San Francisco counties

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

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

Up to $0.70 per hour may be used to meet the Post-Retention Wage in Job Number 1 and up to $1.37 per hour in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		2
Production Coordinator		1
Project Manager		1
Graphic Designer		1
Technical Designer		1
Engineer		1
IT Staff		1
Supervisor		1
Manager		1

Job Number 2		
Administrative Staff		9
Production Coordinator		8
Project Manager		2
Graphic Designer		2
Technical Designer		8
Engineer		4
IT Staff		4
Supervisor		4
Manager		4

INTRODUCTION

Carollo Engineers, Inc. (Carollo) was founded in 1933 in Phoenix, Arizona and is headquartered in Walnut Creek, California. This is an environmental engineering firm specializing in the planning, design, and construction of water and wastewater facilities, with an emphasis on renewable energy alternatives. Carollo has 39 locations in 16 states with training planned for 12 locations in California.

Need For Training

This will be the second Agreement between ETP and Carollo. In the first project, Carollo focused training on Continuous Improvement to eliminate wasteful activities and improve efficiencies in all processes and departments. With these practices now in place, the Company is poised to implement new technology and upgrade industry skills through certifications.

Currently, Carollo clients such as municipal water providers and wastewater treatment plants are required to ensure water conservation across all areas of their operation. This results in increased client demands for design and engineering conservation integration. The Company also required training on a new Video Conference System. ETP funding will enable Carollo to stay ahead of the competition through the state-of-the-art applications management.

Carollo will also provide LEED Accreditation and Professional Engineer certification training to remain competitive and allow them to bid on more contracts.

Retrainee - Job Creation

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

In this proposal, Carollo has committed to hiring 10 new employees (Job Number 1). Carollo 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.

California’s current drought conditions have caused Carollo’s clients to shift processes to ensure water conservation. These clients require updated conservation integration into their waste water treatment plants. The updated integration has increased Carollo’s workflow by 3% and a

backlog of work from 12 to 18 months. To meet the client's needs and decrease backlog, Carollo is expanding their business capacity.

PROJECT DETAILS

Training Plan

Carollo will provide between 8 – 200 hours of Class/Lab and E-Learning in the following:

Business Skills (20%) – Training will be offered to Engineers, Supervisors, Managers, Administrative, Technical and IT Staff to forecast potential challenging scenarios, plan for variations in processes and to ensure timely delivery of services. Training topics include Frontline Decision Making and Problem Solving and Leadership Skills.

Computer Skills (35%) – Training will be delivered to all occupations in job specific computer skills. New technology upgrades in equipment and software will allow staff to implement 3D and 4D applications as well as enable virtual meetings, incorporate needed software to access data and files across all departments and from jobsites. Training topics include Adobe Software Upgrades, CAD 3D and 4D Imaging and Modeling, Microsoft Office 2013 Info Sharing Interface, SAN and Servers and Video Conference Equipment Upgrades.

Commercial Skills (15%) – Training will be provided to Technical Designers, Engineers and IT Staff in enable the organization to expand its service capabilities. Training topics will include courses LEED Accreditation, LEED Specialty Accreditation, Professional Engineer Certification and Project Quick Reference.

Continuous Improvement (25%) – Training will be provided to all occupations to support the Company's goals of moving towards a high performance workplace, improve operating costs, reliability, quality and customer satisfaction.

Certified Safety Training (5%) – Training will be provided to Production Coordinators, Project Managers, Graphic Designers, Technical Designers, Engineers and IT Staff as needed for certification per-trainee.

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

2. Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is also a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Commitment to Training

Carollo currently has an annual training budget of $300,000 for all California facilities combined, which includes training such as basic skills, employee orientation and mandated Human Resources compliance training.

Carollo 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0164	Sacramento	10/24/11 – 10/23/13	$99,828	$13,950 (14%)

Carollo completed 14% of the approved contract amount. The prior ETP project originally planned for a small percentage of employees to be trained on a variety of topics. Carollo later identified many processes that were outdated, time consuming, cost ineffective and inefficient. Carollo had to focus on establishing Standard Operating Procedures (SOP). With SOP in place, Carollo was able to upgrade several systems across-the-board.

Given the resources indicated, the new SOP, training hours were substantially reduced and many trainees were unable to meet the minimum 24 hours. The trainees did receive Continuous Improvement skills as funded in part by ETP, with the Company making up the shortfall. With SOP launched, the Company is now ready to renew training and expects 100% performance. Even so, due to the prior performance, the requested funding amount under this proposal has been right-sized to $19,390.

DEVELOPMENT SERVICES

Sallyanne Monti Consulting in San Francisco assisted with development of this proposal for a flat fee of $600.00.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Frontline Decision Making and Problem Solving
- Leadership Skills

COMMERCIAL SKILLS

- Leadership in Energy & Environmental Design (LEED) Accreditation
- LEED Specialty Accreditation (BD & C Upgraded Version 2009-Green Building Design & Construction)
- Professional Engineer Certification
- Project Quick Reference

COMPUTER SKILLS

- Adobe Software Upgrades
  - Acrobat
  - In-Design 6
- CAD 3D & 4D Imaging & Modeling
  - Revit
- Microsoft Office 2013 Info Sharing Interface
  - Intermediate & Advanced
- Storage Area Networks & Servers
- Video Conference Equipment Upgrades

CONTINUOUS IMPROVEMENT

- Performance Management

OSHA 10/30 (OSHA Certified Instructor)

HAZWOPER (Certified Instructor)

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

E-Learning Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Frontline Decision Making and Problem Solving
- Leadership Skills

COMMERCIAL SKILLS

- LEED Accreditation
- LEED Specialty Accreditation (BD & C Upgraded Version 2009-Green Building Design & Construction)

- Professional Engineer Certification
- Project Quick Reference

COMPUTER SKILLS

- Adobe Software Upgrades
  - Acrobat
  - In-Design 6
- CAD 3D & 4D Imaging & Modeling
  - Revit
- Microsoft Office 2013 Info Sharing Interface
  - Intermediate & Advanced
- SAN & Servers
- Video Conference Equipment Upgrades

CONTINUOUS IMPROVEMENT

- Performance Management

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

Fidelis Marketing, Inc.

Small Business ≤ $50,000

ET16-0100

Approval Date: May 27, 2015

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

CONTRACTOR

- Type of Industry: Services
  Technology/Other
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 9
  Worldwide: 9
  Number to be trained: 14
  Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 10%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $16,146
- 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, Commercial Skills, Computer Skills	9	8-60	0	$1,144	$15.75
				Weighted Avg: 44			
2	Job Creation Initiative Priority Rate SB<100	Business Skills, Commercial Skills, Computer Skills	5	8-60	0	$1,170	$15.00
				Weighted Avg: 45			

- Reimbursement Rate: $26 SB Priority
- County(ies): Sacramento
- Occupations to be Trained: Accounting Staff, Graphic Designer, Operations Staff, Owner, Sales Staff
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1 only: $2.70 per hour

SUBCONTRACTORS

- Development Services: Sierra Consulting Services of Cameron Park developed the proposal for a flat fee of $1,500.
- Administrative Services: Sierra Consulting Services will also provide administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2007 and established in Folsom, Fidelis Marketing, Inc. (Fidelis) (http://www.nicefido.com) provides services such as custom social media management and promotion, direct mail marketing, custom websites, and mobile-optimized websites. Its primary customers are in the automobile industry.

Need for Training

Fidelis has been a direct mail marketing company since its inception; however, it recently expanded its operations to include technology solutions services such as custom mobile applications and custom website development. The Company has developed platforms using Instant Data Share (for lead tracking) and Point of Sale. Additionally, the Company has invested in new technology. Digital Variable VIN Match takes a car's Vehicle Identification Number (VIN), matches it to a VIN database and then obtains an image of a similar car. This new technology has already drawn widespread interest from large auto manufacturers and car

dealerships. Trainees will need to learn how to use these technologies in order to successfully launch marketing campaigns.

Fidelis also plans to expand to new industries such as insurance, real estate, and small business. Trainees will need to learn more about these industries in order to market to and attract these customers.

Retrainee - Job Creation

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

The Company is growing; sales have increased 30-40% per year and are projected to continue. The Company must hire to help with current workloads as the Company also has several new contracts with auto dealers in the works. For this proposal, the Company has committed to hiring 5 new employees (Job Number 2). Fidelis 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.

Training Plan

Business Skills – Training will be offered to Accounting Staff, Operations Staff, Owner and Sales Staff. Staff will learn people skills and project management to help them work with customers. Training topics will include courses such as Business Communication, Customer Service, Cost Control, Product Knowledge and Strategic Planning.

Commercial Skills - Training will be offered to Accounting Staff, Operations Staff, Owner and Sales Staff. Training will allow for better understanding of new technology services. Training topics will include Digital Variable VIN Match, Instant Data Share, Point of Sale and QR Codes.

Computer Skills - Training will be offered to Graphic Designers to learn the technology and computer software programs as well as understand new sales marketing campaigns. Training topics will include GoldMine and Hyper Text Markup Language (HTML)

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
- Behavior Style Strategies
- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Communication Styles
- Cost Control
- Dealing with Difficult People
- Employee Coaching
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques
- Negotiating
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Retaining Customers
- Relationship Building
- Strategic Planning
- Time Management

COMMERCIAL SKILLS

- Digital Variable VIN Match
- Instant Data Share
- Point of Sale
- QR Codes

COMPUTER SKILLS

- GoldMine
- HTML

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Financial Statement Services, Inc.

Agreement Number: ET15-0461

Approval Date: May 26, 2015

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

PROJECT PROFILE

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

Number of Employees in:	CA: 134	U.S.: 136	Worldwide: 136
Turnover Rate:	9%		
Managers/Supervisors: (% of total trainees)	19%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$89,100		$0	$0		$89,100

In-Kind Contribution:	100% of Total ETP Funding Required	$156,547

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills	99	8-200	0	$900	$16.02
				Weighted Avg: 60			

Minimum Wage by County: $16.02 per hour for Orange County

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $2.63 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Accounting/Administrative Staff		6
Information Systems 1		9
Information Systems 2		10
Managers/Supervisors 1		7
Managers/Supervisors 2		12
Production Services Staff 1		25
Production Services Staff 2		12
Sales/Marketing/Customer Service Staff		18

INTRODUCTION

Founded in 1980 and headquartered in Santa Ana, Financial Statement Services, Inc. (FSSI) provides customized, variable-data, printed and electronic documents and distribution solutions. FSSI receives encrypted data from virtually any transmission method. The data is then verified and processed through its computer systems to generate customized hard copy, electronic documents and reports into the format requested by clients. Examples of its products include utility bills, bank and financial statements, and other documents.

Over the last serval years, high volume, high quality inkjet printers have replaced lower capacity laser printers. These new printers allow for greater production capacity and a wider variety of products and services, including more detailed color, type and formatting options that weren't

previously available. FSSI's competitors are switching to inkjet printers because they allow the complex options that clients now demand.

In response to these changes, the Company purchased its first inkjet printer in 2013. Initially FSSI trained a small group; however, it needs to provide training on this equipment for additional employees. As more orders that require detailed color options, additional workers need training. Inkjet printing has become the industry standard and demand for its capabilities are increasing. FSSI is currently negotiating to obtain another inkjet printer, which will be installed in mid-2015. The new printer will cost approximately $1.5M.

In addition to printer training, the Company has an Internal Proprietary Software program, which directs business workflow. Changes to this system are required to incorporate the new printer and to update the process flow and procedures. All employees require training. With higher production capacity and quality, FSSI needs to train its employees in Continuous Improvement skills to meet customer demands efficiently and on time. In order to remain competitive and move toward a high performance workplace, FSSI's production processes also need to be improved.

PROJECT DETAILS

Training Plan

Training will take place at company headquarters in Santa Ana with a combination of internal and outside trainers.

Business Skills (35%): Training will be offered to Managers/Supervisors, Accounting/Administrative, Sales, Marketing & Customer Service staff in project management, strategic planning, negotiating, customer relations, conflict management, communication skills and telephone skills. Training will improve employee skills with current and potential customers and provide a new level of excellence. This training will enhance communication among all groups and customers.

Computer Skills (20%): Training will be offered to Information Systems Staff to program and adapt the operating systems of both the printers and the internal proprietary software. Due to business and customer demands, software continually changes. Training will give workers the skills to efficiently and effectively to adapt to the those business needs.

Continuous Improvement (20%): Training will be offered to all occupations in statistical analysis, process improvement, teambuilding, and coaching. Training provides employees the tools to improve performance, productivity and product quality in the most efficient way possible. Teambuilding and coaching will give trainees the skills to work together more effectively to create a high performance workplace.

Manufacturing Skills (25%): Training will be offered to Production Services Staff in production scheduling, process automation, machine operation, forklift training, and cross-functional equipment and process training. This training will give workers the tools to improve performance as well as increasing productivity and product quality efficiently. Cross-Functional training will provide the skills to manage workflow and output.

Commitment to Training

FSSI spends an estimated $40,000 per year on training. Training includes new hire training (onboarding), security, safety, proprietary software and production equipment as needed. Training is conducted via classroom and on-the-job and is mandatory.

FSSI 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 is ready to begin training upon Panel approval. The CFO will have overall responsibility for the project. The HR staff will assist in scheduling training and collecting rosters. FSSI has hired an administrative subcontractor to assist in enrolling trainees, entering training hours and meeting with ETP staff.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Tax Credit Company in Los Angeles assisted with development of this proposal for a flat fee of $9,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Project Management
- Strategic Planning
- Business Writing
- Customer Relations
- Identifying Customer Needs
- Resolving Complaints
- Conflict Management
- Telephone Skills
- Communication Skills
- Leadership
- Decision Making
- Administrative Procedures
- Motivation

COMPUTER SKILLS

- Operating System Software Upgrade
- Internal Proprietary Business Workflow Software Upgrade

CONTINUOUS IMPROVEMENT

- Statistical Analysis
- Process Improvement
- Teambuilding
- Coaching

MANUFACTURING SKILLS

- Production Scheduling
- Production Operations
- Process Automation
- Forklift Training
- Understanding Machine Operations
- Cross-Functional Equipment Skills
- Cross-Functional Process Skills

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

Gar Tootelian, Inc.

Small Business ≤ $50,000

ET15-0455

Approval Date: May 15, 2015

ETP Regional Office: Sacramento **Analyst:** W. Sabah

CONTRACTOR

- Type of Industry: Wholesale Trade
  Retail
  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees
  California: 98
  Worldwide: 98
  Number to be trained: 98
  Owner ☐ Yes ☒ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 5%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $49,588
- In-Kind Contribution: $65,000

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	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., Hazardous Mat.	79	8-60	0	$506	$15.07
				Weighted Avg: 23			
2	Retrainee Job Creation Initiative SB<100	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., Hazardous Mat.	19	8-60	0	$506	$12.33
				Weighted Avg: 23			

- Reimbursement Rate: Job #'s 1 & 2: $22 SB Non-Priority
- County(ies): Fresno
- Occupations to be Trained: Administrative Staff, Pest Control Advisors, Warehouse Staff, Delivery Staff, Plant Nutrition Staff, Compliance Staff, Safety Staff, Blending Plant Staff, Trap Crew, Front Line Manager
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $0.57 per hour Job #2: $1.33 per hour

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC in Visalia assisted with development for a flat fee of $3,500.
- Administrative Services: Strategic Business Solutions, LLC will also provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: N/A

OVERVIEW

Gar Tootelian, Inc. (Gar Tootelian) (www.gtipros.com) began as a farm in 1944 and expanded in 1949 to become a small retail fertilizer and agricultural chemical business in Reedley. The Company is a provider of environmentally safe bio-technology, agricultural chemical, and crop services to farming operations in California. Gar Tootelian also provides services on pest diagnosis and control, yield monitoring, water conservation and management, soil analysis, crop analysis, micro-irrigation, and complete nutrition. With the Company's registered Environmental Protection Agency products and organic products, Gar Tootelian's specialists are able to maximize crop yields by controlling weeds, pests and plant diseases.

Need for Training

Gar Tootelian's main goal is to retain a reputation for quality and service by providing customers with current crop solutions. The Company's previous plant has reached its limit as sales have grown at a tremendous rate in the last three years. Due to this growth, the Company expanded and reorganized the entire Company to increase capacity to meet customer demand while providing excellent customer service.

Farmers have been challenged with stressed crops due to California's drought conditions. These farmers rely on Gar Tootelian's staff to prescribe them with customized and effective solutions to pest control and plant nutrition. To meet customer needs, the Company has developed a training plan to increase staff's expertise in the science of proper crop nutrition and pest control in drought conditions. In addition, the Company purchased a new 30,000 square feet warehouse facility in 2015. Staff requires training in the new warehouse inventory controls to efficiently set up warehouse operations and improve production reports.

This is the second proposal for Gar Tootelian. The proposed training plan may include employees who participated previously, and some curriculum topics are repeated; however, Gar Tootelian confirmed that course content has been updated to eliminate duplication of training. In addition, the trainee population has been expanded to include recently hired employees who have not received ETP-funded training in the past.

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.

Gar Tootelian has committed to hiring 19 new employees (Job Number 2). Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

Gar Tootelian is in a tremendous growth mode and has built a new 30,000 sq. ft. warehouse to store, organize and stage inventory. In addition, the Company built a new on-site Fertilizer Mixing Plant in 2014 to offer in-house solutions with proprietary blends to meet customer needs. The Company is embarking on new LEAN Processes to insure that the new facility and plant expansions meet their highest potential. This will require the addition of 19 new employees. To support the expansion, the Company will add a Trap Crew, Warehouse, Delivery and Plant Nutrition Staff.

Training Plan

Gar Tootelian will provide 8-60 hours of Class/Lab training delivered by in-house subject matter experts. Training will commence in May 2015 and will take place at the Company's location in Reedley. Although the Company plans to train its entire workforce, delivery will be scheduled carefully to synchronize with ongoing operational needs.

Business Skills: Training will be offered to all occupations excluding Blending Plant Staff and Front Line Managers. Training will improve communication skills, increase product knowledge, identify customer needs and improve productivity. Training will include Customer Service Skills, Development Strategies, and Fiscal and Accounting Strategies.

Commercial Skills: Training will be offered to Delivery Staff, Warehouse Staff, Blending Plant Staff, Pest Control Advisors, and Plant Nutrition Staff. Pest Control Advisors and Plant Nutrition Staff will be trained on the science of proper crop nutrition to identify specific crop needs. Blending Plant Staff, Delivery Staff, and Warehouse Staff will be trained to properly blend, produce, label, store and deliver products. Training course topics will include Agronomy Best Practices, Fertilizer Blending Best Practices, Confined Space Safety, and Combustible Dust Safety.

Computer Skills: Training will be offered to Front Line Managers, Administrative, Warehouse, Delivery, Safety and Compliance Staff. Workers will receive training in Gar Tootelian's internal software systems to manage warehouse functions and scheduling of deliveries. Training will allow workers to handle accounting sales, provide improved customer service, and to properly inventory products. Trainees will build on the training received in the prior ETP contract to expand expertise in the Agriam Software and SASS Software. Topics will include Advanced Agriam Software Training and Advanced Simplified Accounting Solutions Software Training.

Continuous Improvement: Training will be offered to all occupations as Gar Tootelian begins Phase 1 of a Lean transformation program. Lean process was part of the prior contract; however, trainees did not receive this training due to the Company's refocus on the new facility. This training will focus on process analysis and waste identification to improve production operations. Inventory Control Systems training will help trainees integrate the inventory system into the administrative operating system to improve reporting and monitoring. Training will include LEAN Processes and Inventory Control System.

Hazardous Materials: Training will be offered to Front Line Managers, Plant Control Advisors, Delivery, Warehouse and Plant Nutrition Staff. Trainees will acquire the skills to identify, contain, and clean-up waste or accidental chemical spills. Training will include Hazardous Materials Response and Clean-Up.

High Unemployment Area

All trainees work in a High Unemployment Area, with unemployment exceeding the state average by at least 15%. However, Gar Tootelian is not asking for a wage and/or retention modification.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0330	Reedley	4/5/13 – 4/4/15	$49,456	$47,242 (96%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service Skills
- Development Strategies
- Fiscal and Accounting Strategies

COMMERCIAL SKILLS

- Agronomy Best Practices
- Fertilizer Blending Best Practices
- Confined Space Training*
- Combustible Dust Training*

COMPUTER SKILLS

- Advanced Agriam Software
- SASS Accounting Software

CONTINUOUS IMPROVEMENT

- Lean Processes
- Inventory Control Systems
  - Visual Factory
  - KanBan
  - 5 “S”

HAZARDOUS MATERIALS

- Hazardous Materials Response and Clean-Up

*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.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

RETRAINEE - JOB CREATION

Training Proposal for:

John F. Otto, Inc. dba Otto Construction

Agreement Number: ET15-0474

Approval Date: June 2, 2015

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

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative SET HUA	Industry Sector(s):	Construction Priority Industry: ☒ Yes ☐ No
Counties Served:	Monterey, Sacramento	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 120	U.S.: 120	Worldwide: 120
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	12%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$67,620		$0	$0		$67,620

In-Kind Contribution:	100% of Total ETP Funding Required	$97,170

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, Mgmnt. Skills, OSHA 30	47	8-200	0-22	$1,260	$20.55
				Weighted Avg: 70			
2	Retrainee Job Creation Initiative Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, Mgmnt. Skills, OSHA 30	6	8-200	0-22	$1,400	$20.55
				Weighted Avg: 70			

Minimum Wage by County: SET/Priority Industry: $20.55 per hour

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

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

Up to $4.55 per hour may be used to meet the Post-Retention Wage for Job Number 1; and up to $2.55 per hour may be used for Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Accounting Staff		3
Administrative Staff		1
Estimator		2
Senior Estimator		1
Information Technology Manager		1
Marketing Representative		1
Project Engineer		13
Project Assistant		2
Front Office Staff		2
Project Manager		11
Superintendent		8
Safety Manager		1
Shop Staff		1

Job Number 2		
Administrative Staff		1
Estimator		2
Project Engineer		2
Project Assistant		1

INTRODUCTION

John F. Otto, Inc. dba Otto Construction (Otto Construction) (http://ottoconstruction.com/), was founded in Sacramento in 1947. Otto Construction is a California licensed general contractor providing multiple construction services including: construction project oversight, subcontractor hiring and management, work responsibility designation, and lease-leaseback services.

The Company has worked on the construction of office buildings, parking structures, community centers, manufacturing plants, senior care facilities, educational facilities and hospitals. The Company has also been involved in historical renovation projects. Otto Construction has facilities in Sacramento and in Monterey, both of which will participate in this training proposal.

PROJECT DETAILS

Otto Construction is aiming to be at the forefront of Leadership in Energy and Environmental Design (LEED) for the construction industry in Northern California. LEED promotes “green” construction to use key resources more efficiently. LEED standards mean that a building’s design, construction, and performance meet five key areas of environmental and health concern: energy efficiency, water efficiency, materials use, resource use, and indoor air quality.

As environmental awareness becomes more prevalent, the demand for LEED construction has increased significantly. To meet consumer needs, staff will require training in the design and build services required from LEED certification. In addition, Otto Construction will deliver training to improve communication, sales, marketing, software, management, hazardous materials and Lean concepts.

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.

Otto Construction has committed to hiring six 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.

Otto Construction is expanding its market share consistent with upgraded services using LEED certification standards. The business expansion will increase the number of projects the Company can bid. The Company estimates that they will increase their staff by 10% to meet the increase in business from taking on LEED projects.

Training Plan

Trainees will receive between 8-200 hours of Classroom/Laboratory and/or E-Learning training. In addition, trainees may receive up to 22 hours of Computer-Based Training (CBT). CBT will lay the foundation for courses and class/lab training will expand on those lessons.

Business Skills (25%): Training will be delivered to all occupations and will focus on industry best practices to ensure project success and improving interpersonal and soft skills. Training topics include Sales, Marketing, Negotiation, Risk Management, Business Communication, Construction Law and Contracts, Lease Back Contract Writing and Management, and Construction Financial Analysis and Accounting.

Commercial Skills (30%): Training will be delivered to Estimators, Senior Estimators, Project Engineers, Project Assistants, Superintendents and Project Managers. Training will focus on the principles of LEED, "Green" Construction and the further development of its staff's knowledge of the construction industry. Training will include Concrete Forming, Construction Management, Estimating, Environment Impact Planning, LEED Building Design, LEED Building Fundamentals, Electrical and Plumbing. [Note: There are classes on "Lien Law & Remedies." (See Exhibit B) The company represents that these classes would not be used to assent or defend their rights in relation to private parties, but only to commercial/industrial clients.]

Management Skills (5%): Training will be delivered to Managers and Supervisors to foster a highly productive work atmosphere and to grow the talents of emerging leaders. Topics include Achieving Operational Excellence, Coaching Procedures, Effective Meetings for Leaders, Leadership Skills, Motivational Skills, Team Building and Decision Making.

Computer Skills (20%): Training will be delivered to the Information Technology Manager, Project Engineers, Project Assistants, Front Office Staff, Administrative Staff, Estimators, Senior Estimators and Accounting Staff. Training delivered will improve processes and efficiencies and focus on building design software, accounting software and a new enterprise resource planning (ERP) system. Topics include BIM/Revit/Navis, Intermediate or Advanced Microsoft Office, ERP, Innovaya Software, In Design Software, Plangrid and Timberline.

Hazardous Materials (5%): Training will be delivered to all occupations excluding Front Office, Accounting and Administrative Staff. This training is necessary to ensure that hazardous materials are handled and disposed of properly on the construction site. Training topics include Asbestos Removal, Hazardous Materials Handling, Lead Renovation, and Storm Water Compliance.

Continuous Improvement (10%): Training will be delivered to all occupations to promote a higher degree of quality and efficiency companywide. Training is critical to allow projects to remain on budget. Training topics include Cost Control, Creating a Culture of High Performance, Problem Solving and Decision Making, Quality Control and Waste Reduction.

OSHA 30 (5%): This training is a series of courses "bundled" by industry sector and occupation. It consists of 30 hours of course material for frontline supervisors and Safety Managers. 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. Otto Construction will provide this training to Project Managers, Superintendents and Safety Manager.

Part Time-to-Permanent

Otto Construction currently employs college students on a part-time basis. These employees will participate in training and may receive an offer of full time employment after graduation. To remain consistent with the Panel's guidelines for "temporary to permanent" employment, it will be made a condition of the contract that Otto Construction cannot invoice for part-time employees until they have been hired on a full-time permanent basis, and retention cannot begin until after they are hired on such basis.

Special Employment Training/High Unemployment Area

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. For Priority Industries the wage may be reduced by 25% to $20.55. Otto Construction is requesting this modification for Job Numbers 1 & 2.

Five trainees in Job Number 1 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 15%. The Company's location in Monterey County qualifies for HUA status under these standards. However, Otto Construction is not requesting a wage or retention modification.

Impact/Outcome

Otto Construction's dedication to training will allow their staff to become more reputable and knowledgeable. The training will ultimately lead to Otto Construction winning more bids and growing as a company.

Commitment to Training

Otto Construction has an annual training budget of $80,000 per location, which includes state-mandated safety, construction regulations training, new employee orientation, and sexual harassment prevention. Otto Construction represents that ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. .

- Training Infrastructure

The Company currently has six in-house instructors that deliver training in their area of expertise. Additionally, Otto Construction has designated a staff member to schedule training and oversee the completion and collection of training rosters. Sierra Consulting Services has been retained by Otto Construction and will be responsible for administration duties.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Sierra Consulting Services in Cameron Park assisted with development for a flat fee of $2,695.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Automated Purchase Order System
- Billing Process
- Business Communications Skills
- Business Writing and Grammar Skills
- Cash Flow Management
- Communications Across Generations
- Conflict and Dispute Resolution
- Construction Accounting
- Construction Law and Contracts
- Construction Financial Analysis
- Sales Skills
- Controlling Chaos and Thriving Under Pressure
- Marketing Skills
- Negotiation Skills
- Finance for Construction
- Presentation Skills
- Lease Back Contract Writing and Management
- Effective Meetings
- Mentoring Skills
- Networking Skills
- Project Scheduling and Management
- Public Speaking Skills
- Risk Management
- Proposal Writing
- Understanding Work-in-Progress
- Change Order Negotiations
- Construction Contract Administration
- Construction Cost Awareness and Production

COMMERCIAL SKILLS

- Construction Material Bonding
- Building Systems
- Concrete Forming
- Confined Space
- Construction Bonds
- Construction Logistics and Sequencing
- Construction Management
- Construction Quality Management
- Contract Documents and Construction Law
- Risk Transfer
- Crisis Management
- Environmental Impact Planning
- Estimating
- Foreman's Advantage

- Obtaining Work Authorization
- Construction Insurance
- Leadership in Energy and Environmental Design (LEED) Building Codes
- LEED Building Design
- LEED Building Fundamentals
- Lien Law & Remedies
- Managing Subcontractors
- Mechanical, Electrical and Plumbing
- Planning and Scheduling
- Project Engineer Boot Camp
- Tank Construction
- Unit Cost Tracking
- Work Order Processing
- Confined Space
- Defensive Driving
- Fall Protection
- Forklift Training

COMPUTER SKILLS

- Intermediate and Advanced Microsoft Office
- Building Information Modeling (BIM)
- BIM/Revit/Navis
- Bluebeam
- CAD Software
- Graphic Design
- ERP System
- In Design Software
- Innovaya Software
- P6
- Plangrid
- Timberline - Projections
- Revit Architecture Fundamentals
- Social Media (ex. Linked in)
- Suretrack
- Timberline Software
- VM Ware
- Website Maintenance

CONTINUOUS IMPROVEMENT

- Change Management
- Change Order Reduction
- Cost Control
- Creating a Culture of High Performance
- Coaching/Mentoring Skills
- Leadership Skills
- Problem Solving/Decision Making
- Process Capability
- Process Improvement
- Production Operations/Workflow

- Project Management
- Quality Control
- Sequencing for a Successful Project
- Teamwork
- Time Management
- Heat Illness Awareness
- Waste Reduction

HAZARDOUS MATERIALS

- Asbestos Removal
- Excavation Safety
- Hazardous Chemical Overview
- Hazardous Materials Handling
- Lead Renovation
- Storm Water Compliance

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Achieving Operational Excellence
- Coaching Procedures
- Decision Making
- Effective Meeting for Leaders
- Emerging Managers Development
- Essential Skills for New Supervisors
- Finance for Technical Managers
- Financial Analysis for Non-Financial Managers
- Leadership Skills
- Motivation Skills
- Supervisory Skills
- Team Building
- Manager Skills – Communication, Writing, Grammar, Listening, and Conflict Resolution

OSHA 30 (Certified Instructor)

- OSHA 30 (requires completion of 30 hours)

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

E-Learning Hours

0-200

BUSINESS SKILLS

- IT Help Desk Management
- Construction Cost Awareness and Production

COMMERCIAL SKILLS

- Estimating
- Construction Insurance
- Planning and Scheduling
- Construction Bonds

CBT Hours

0-22

BUSINESS SKILLS

- Contagious Leadership (1 hr)
- Assertive Communication Skills (1 hr)
- Control the Chaos and Clean Out the Clutter (1 hr)
- Controlling Chaos and Thriving Under Pressure and Destruction (1 hr)
- How Conversation Works (1 hr)
- How to Deal with Difficult People (1 hr)
- Memory Dynamics (1hr)
- Intermediate/Advanced Microsoft Office Short Cuts, Tips & Tricks (1 hr)
- New Psychology of Achievement (1 hr)
- Reading Dynamics (1 hr)
- Relationship Strategies (1 hr)
- Say “No” Without Guilt (1hr)

CONTINUOUS IMPROVEMENT

- 7 Habits of Highly Effective People (1 hr)
- Stephen R. Covey 0 The 8th Habit (1 hr)
- How to Overcome Negativity in the Workplace (1 hr)
- Problems at Work (1 hr)
- Safety and Security at the Front Desk (30 min)
- Self Esteem and Peek Performance (1 hr)
- Self-Discipline & Emotional Control (1 hr)

MANAGEMENT SKILLS

- Coaching Skills for Managers and Supervisors (1 hr)
- How to Delegate Work and Ensure it’s Done Right (1 hr)

CBT is capped at 50% of total training hours, per trainee excluding OSHA 10/30 and HAZMAT.

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 excluding OSHA 10/30 and HAZMAT.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Nemat Incorporated

Small Business ≤ $50,000

ET15-0460

Approval Date: May 20, 2015

ETP Regional Office: Sacramento **Analyst:** A. Greene

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 29

  Worldwide: 29

  Number to be trained: 29

  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 15%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $45,240
- In-Kind Contribution: $60,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Computer Skills, Cont. Imp., Management Skills, Manufacturing Skills	21	8 - 60	0	$1,560	$15.07
				Weighted Avg: 60			
2	Retrainee SB <100 Priority Rate HUA	Computer Skills, Cont. Imp., Management Skills, Manufacturing Skills	8	8-60	0	$1,560	$11.50
				Weighted Avg: 60			

- Reimbursement Rate: Job #'s 1 & 2: $26 SB Priority
- County(ies): Madera
- Occupations to be Trained: CNC Machine Operators; CNC Machine Set-Up Staff, Programing Staff; Quality Control Staff; Office Staff, Lead Staff, Management Staff, Owners
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $3.57 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: Roger Bastien in Castro Valley will provide Continuous Improvement training; and Jeffrey B. Booey in Clovis will provide Continuous Improvement and Computer Skills training.

OVERVIEW

Established in 1994 and located in Madera, Nemat Incroporated (Nemat) operates a Computer Numerical Control (CNC) precision machine shop. The Company fabricates high precision metal parts, assemblies and vacuum equipment for original equipment manufacturers in the semiconductor, solar, glass coating, flat screen television and automotive industries. Customers include Parker Hannifin, Guardian Glass, Cardinal Glass, Applied Materials Inc., and GE Medical.

Nemat also provides consulting services in process management, employee development and performance improvement. Customers for consulting services include Sun Microsystems, Pacific Gas & Electric Company and Peerless Lighting.

Need For Training

The curriculum outlined in this proposal will allow employees to expand and upgrade their skills and earning capabilities. Nemat also trains newly-hired employees with no previous CNC manufacturing experience to become effective and efficient in this skill set.

This will be Nemat's fourth ETP-funded training. Under this proposal, training will continue in the practices of Lean manufacturing and continuous process improvement. Topics will build upon training from the previous agreement to strengthen skill sets and facilitate greater productivity and efficiency. ETP funding will support these training efforts and enable them to improve product quality and enhance the Company's competitiveness in the marketplace. No training will be duplicated.

Training Plan

Nemat will provide 8-60 hours of Class/Lab training delivered primarily by in-house staff. Approximately 10-15% of the training will be performed by outside vendors.

Computer Skills – Training will be offered to CNC Machine Set-Up, Programing, and Quality Control Staff on software programs for CNC machines, lathes, and quality testing equipment. Managers, Office and Lead Staff will receive training on Sage 50 MRP, Microsoft Office and Microsoft Project.

Continuous Improvement – Training will be offered to all occupations. Kaizen methods will empower employees to make real and lasting changes in their work processes. Other training topics include KanBan Set-Up and Implementation, Materials and Product Flow Systems and Quick Change Tooling Procedures.

Management Skills – Training will be offered to Owners and Managers. Training will aid in the facilitation of the long, middle, and short-range plans of the Company for future growth, product development, and distribution networking. Training in strategic planning and project management skills will raise the expertise level of mid-range management positions making them more integral to the Company's planning process. Topics include Leadership, and Contract and Pricing Negotiation.

Manufacturing Skills – Training will be offered to CNC Machine Operator, CNC Machine Set-Up and Programing Staff. Processes will be analyzed and KanBan systems will be set up to insure that materials are stored and accounted for properly and that set-up and change-over times are dramatically reduced. Operators will be trained on measuring the quality of the product produced to assure adherence to drawing specifications. These skills will transform Nemat into a place of empowerment that will provide safe secure jobs in a high performance, state of the art work environment. Topics include World Class Manufacturing and Quick Change Tooling Procedures.

High Unemployment Area

Nemat is located in Madera County which is in a High Unemployment Area (HUA), with unemployment exceeding the state average by 15%. The Company qualifies for HUA status and the Panel may modify the ETP Minimum Wage for these trainees by up to 25%. Nemat is requesting a wage modification to $11.50 per hour for trainees in Job Number 2 only.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Nemat under an ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET11-0266	Madera	5/13/11 – 5/12/12	$39,000	$39,000 (100%)
ET10-0302	Madera	10/29/09-10/28/10	$35,880	$35,880 (100%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

COMPUTER SKILLS
- CNC Machine Programing
- Microsoft Office (Intermediate or Advanced only)
- Microsoft Project
- Sage 50 MRP

CONTINUOUS IMPROVEMENT
- Cellular Manufacturing
- Industrial Housekeeping 5S
- KanBan Set-Up and Implementation
- Materials and Product Flow Systems
- Organizational Change Management
- Preventative and Corrective Actions
- Process Analysis and Review
- Production Models and Techniques
- Production Standards
- Quality Control Systems
- Quick Change Tooling Procedures
- Reducing Set-Up Time
- Standards and Measurements
- Team Building and Problem Solving Skills
- Tools and Processes for Leading Change
- Understanding Organizational Culture
- Visual Factory

MANAGEMENT SKILLS (Owners/Managers Only)
- Contract and Pricing Negotiation
- Handling Special Orders
- Improving Customer and Vendor Relationships
- Leadership Skills
- Leading Change
- Strategic Planning
- Team Building and Problem Solving Skills

MANUFACTURING SKILLS
- Cellular Manufacturing
- CNC Machine Operation
- CNC Machine and Tooling Set-Up
- Cross-Training in Production Equipment and Controls
- KanBan Set-Up and Implementation
- Materials and Product Flow Systems
- Process Analysis and Review
- Production Standards
- Quick Change Tooling Procedures

- Reducing Set-Up Time
- World Class Manufacturing Practices

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:

St. George Warehousing & Trucking Co. of California, Inc.

Agreement Number: ET15-0453

Approval Date: May 15, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate SET HUA	Industry Sector(s):	Transportation/Logistics Warehousing Wholesale Trade Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 110	U.S.: 320	Worldwide: 320
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	0%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$99,960		$0	$0		$99,960

In-Kind Contribution:	100% of Total ETP Funding Required	$81,900

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Business Skills, Computer Skills, Continuous Impr., HazMat, Literacy Skills, OSHA 10/30	9	8-200	0	$1,512	$21.75
				Weighted Avg: 84			
2	Retrainee SET HUA Priority Rate	Business Skills, Computer Skills, Continuous Impr., HazMat, Literacy Skills, OSHA 10/30	14	8-200	0	$1,512	$16.00
				Weighted Avg: 84			
3	Retrainee SET HUA Reduced Wage Priority Rate	Business Skills, Computer Skills, Continuous Impr., HazMat, Literacy Skills, OSHA 10/30	32	8-200	0	$1,512	$11.98
				Weighted Avg: 84			
4	Retrainee-Job Creation HUA Reduced Wage Priority Rate	Business Skills, Computer Skills, Continuous Impr., HazMat, Literacy Skills, OSHA 10/30	10	8-200	0	$1,680	$11.00
				Weighted Avg: 84			

Minimum Wage by County: Job Number 1, SET Priority Retrainee: $20.55 statewide. Job Number 2, HUA Retrainee: $15.97 for Los Angeles County. Job Number 3, HUA Retrainee Reduced Wage: $11.98 for Los Angeles County. Job Number 4, HUA Retrainee-Job Creation Reduced Wage: $9.98 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 $0.98 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 Administration/Clerical Staff		4
Frontline Supervisor/Manager		5
Job Number 2 Administrative/Clerical Staff		5
Frontline Supervisor/Manager		6
Warehouse Staff		3

Job Number 3 Administrative/Clerical Staff		7
Frontline Supervisor/Manager		1
Warehouse Staff		24
Job Number 4 Administrative/Clerical Staff		10

INTRODUCTION

Founded in 1985, St. George Warehouse & Trucking Co. of California, Inc. (STG) is a subsidiary of St. George Logistics (www.stgusa.com). St. George Logistics is a comprehensive logistics and warehouse service provider offering ocean and air container freight services, distribution and transportation. The parent company is headquartered in south Kearny, NJ, with 12 US facilities strategically located in close proximity to large ports and metropolitan areas. STG, located in Compton, is a United States Customs-bonded container freight station serving the Ports of Los Angeles and Long Beach offering warehousing and transportation tailored to fit customers' specific requirements. STG's clients include some of the world's largest freight forwarders, shipment consolidators, major US retailers, and specialty importers.

This is STG's first ETP contract. The Company's three commonly owned facilities in Compton and Santa Fe Springs in Los Angeles County will participate in this training. STG will hold the contract for itself, and will also be the lead employer for its two closely-affiliated entities: St. George Employee Leasing, Inc. co-located with STG in Compton, and St. George Distribution Corp. in Santa Fe Springs. St. George Distribution Corp. provides public warehouse operations servicing retailers with product pick up at the ports, storage and distribution across the United States. St. George Employee Leasing is the company under which the warehouse staff of STG is paid per their service agreement with STG, operating as a co-owner Professional Employed Organization.

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

Recent industry changes have required the companies to focus on cost-cutting activities that are reshaping the nature of their services they offer. According to STG, clients are demanding greater transport efficiency due to the ongoing operational consolidation of major trade lines. These alliances bring high levels of utilization, low slot costs, and greater potential market share. More capacity in fewer hands has led to creative management techniques, new port drayage handling procedures, and the need to maximize terminal operations for shippers.

In response to these changes, STG has implemented new warehousing strategies. This includes overall inventory reduction; greater focus on employee performance; and investment in upgrading material handling systems, from the design phase to vendor selection.

In addition to these upgrades, STG operations must be more responsive to new order profiles, such as: more lines per order; fewer units per line; and smaller, more frequent orders. These new profiles result from the STG customer base shifting toward e-business and wholesale models.

Due to recent tax increases on imported cargo, STG revamped its own business model to focus more on local cargo. This shift requires training on local standards, productivity, and customer service.

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, STG has committed to hiring 10 new employees in administrative/clerical positions as shown in Job Number 4. STG 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.

In addition to equipment purchases needed to meet customer increased demands, STG will also expand its services to include export consolidations. As a result, STG will increase its clerical workforce to ensure that the quality of service is met. These newly-hired workers are needed to support the strategic initiatives to become more efficient, and shift in business to be more competitive.

PROJECT DETAILS

Training Plan

Training will be delivered by in-house subject matter experts and/or training vendors based on specialty. The proposed training will take place at the Company’s participating locations in Compton and Santa Fe Springs.

Business Skills (20%) – Training will be offered to all staff to improve daily interactions among staff and clients and to stand out from competitors in the market by offering superior service.

Computer Skills (25%) – Training will be offered to all occupations in order to upgrade and improve employees’ skills in STG’s new proprietary Cargo Manager Software so that staff can keep tabs on equipment and freight in real time, and keep the cargo moving. Some Warehouse Staff will be trained on processing orders via radio frequency devices enabling accuracy in handling cargo. Additional training will focus on MS Word/Excel to allow employees to produce reports for understanding key performance indicators.

Continuous Improvement (25%) – Training will be offered to all staff in order to improve and implement additional cost saving tools within the organization, and to reduce errors in cargo handling and shipping. Staff will be trained on new terminal operational and procedural changes, new internal cargo tracking and billing, and new customer requirements. Training will cover reporting milestone events such as vessel discharge, customs exams, and updating real-time cargo status. Quality Control will cover different types of packaging, how to read/understand cargo markings, how to stack/wrap packages on pallets to ensure proper handling with minimal errors. Teamwork will provide skills to enhance performance by working well with coworkers on completing assigned tasks. Leadership Skills will motivate employee performance. Productivity is required for proper handling of cargo receipts and shipping.

Hazardous Materials (10%) – Training will be offered to Warehouse Staff to ensure compliance with regulations, and employee safety when handling hazardous materials.

Literacy Skills (10%) – Training will be offered to Warehouse Staff to ensure employees' handling cargo understand the instructions provided, and can properly identify marks/numbers on cargo. Training will also improve communication between employees and supervisors.

OSHA 10/30 (10%)

OSHA 10/30 is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours for frontline workers and 30 hours for supervisors. This training is not required as a condition of doing business in California; however, the coursework must be approved by, and the instructors must be certified by Cal-OSHA. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course. OSHA 10/30 is not included in the 10% limitation on safety training.

For this project, OSHA 10/30 will be provided to Warehouse Staff and Frontline Supervisors to ensure compliance with regulations about emergency action plans, personal safety equipment, recordkeeping and reporting, and becoming safety leaders. The courses will cover accident prevention, emergency response procedures, and monitoring the work area to ensure compliance with safety guidelines.

Impact/Outcome

The proposed ETP-funded training will help STG subsidize the high cost of training of new and incumbent staff. As a result of the training, trainees will be able to excel in their current jobs and become eligible for promotion. Effective cargo management will generate quality outcomes, reduce customer complaints, reduce errors, and increase total volume of cargo moved; thereby, increase profitability, reduce turnover, and sustain growth.

Commitment to Training

STG 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.

STG's training budget is $20,000 per facility. This includes training in state-mandated courses, company policies and procedures, safety, hazardous materials, forklift, and Cargo Manager Software. The proposed contract will allow STG to implement more training initiatives, and increase training efforts by allowing training on a larger scope.

Modification

SET Frontline Worker

The Company uses several job classifications with a "supervisor" or "manager" in the title. These frontline supervisors do not have the ability to hire or fire, and they spend the majority of their work hours as frontline workers performing the same responsibilities as other employees in their occupation. Based on the nature and scope of their job duties, these employees are not exempt from overtime compensation. Therefore, they meet the Panel's definition of frontline workers. As such, 12 Frontline Supervisors will participate in training to be able to develop work teams and effectively coach and mentor team members.

High Unemployment Area

56 trainees in this proposal work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by 25%. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. The Company's location in Compton (Los Angeles County) qualifies for HUA status under these standards.

➢ Wage Modification

The Panel may modify the ETP Minimum Wage by up to 25% for training in a HUA. STG is requesting this wage modification to $16.00 in Job Number 2, and $11.98 in Job Number 3. In Job Number 3, post-retention wages will have to exceed the start-of-training wages. STG is also asking for the HUA wage modification for trainees in Job Number 4 to $11.00, in conformity with the Panel's Standards for Job Creation.

Temporary to Permanent Hiring

10 trainees in Job Number 4 (Job Creation) come under Panel guidelines for "temporary to permanent" employment. STG 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. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by STG. Until then, STG will not receive progress payments.

Part-Time to Full-Time Employment

Some of the trainees, both incumbent workers and Job Creation, will be employed on a part-time basis during the start of training. STG is aware that retention and post-retention wage requirements cannot be satisfied until the trainee has been placed into a full-time permanent position, and progress payments cannot be invoiced until then.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

STG retained Jewish Vocational Services (JVS) in Marina Del Rey to assist with development of this proposal for a flat fee of $7,950.

ADMINISTRATIVE SERVICES

JVS 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
- Customer Service
- Over Short & Damaged (OSD) Reporting

COMPUTER SKILLS
- Cargo Manager
- MS Office (Intermediate/Advanced)
- Radio Frequency (RF)

CONTINUOUS IMPROVEMENT
- Cargo Handling Processes and Procedures
- Forklift
- Leadership for Frontline Workers
- Package Type Sorting
- Quality Control
- Team Work

HAZARDOUS MATERIALS
- Handling Hazardous Cargo
- Understanding Hazardous Placards

LITERACY SKILLS
- Vocational English as a Second Language

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

OSHA 10/30 (certified OSHA Instructor)
- OSHA 10 (Requires Completion of 10 hours)
- OSHA 30 (Requires Completion of 30 hours)

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

DELEGATION ORDER

Retrainee - Job Creation Training Proposal for:

Ultra Pro International LLC

Small Business ≤ $50,000

ET15-0476

Approval Date: June 11, 2015

ETP Regional Office: North Hollywood **Analyst:** J. Romero

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 93

  Worldwide: 93

  Number to be trained: 97

  Owner ☐ Yes ☒ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 12%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $49,920
- In-Kind Contribution: $99,715

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee HUA SB <100 Priority Rate	Business Skills, Computer Skills, Continuous Improvement, HazMat., Manufacturing Skills	93	8-60	0	$520	$11.98
				Weighted Avg: 20			
2	Job Creation HUA Priority Rate SB<100	Business Skills, Computer Skills, Continuous Improvement, HazMat., Manufacturing Skills	4	8-60	0	$390	$10.18
				Weighted Avg: 15			

- Reimbursement Rate: Job #s 1 & 2: $26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Production Workers, Engineering, Administrative Staff, Supervisor/Manager
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $1.80 per hour Job #2: $0 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source in Seal Beach assisted with development for a fee of $4,900.
- Administrative Services: Training Funding Source will also provide administrative services for a flat fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1952, Ultra Pro International LLC (Ultra Pro) is a family-owned company located in the City of Commerce. It is one of the leading manufacturers and suppliers of various storage solutions for photographs, photofinishing products and sports and gaming collectibles. Ultra Pro's products include albums, portfolios, deck boxes and protectors, scrapbooks, refill pages and chip holders. Ultra Pro's multimedia product line also features storage accessories for images, music and multimedia CDs. The Company sells its products through a network of distributors and retailers within and outside the United States, and offers online shopping and customer care services.

Ultra Pro has expanded its business into new markets in Latin America and Southeast Asia, and offers a different product mix than what is traditionally offered in the U.S. and Europe. The Company also expanded its sales network to key retailers like Amazon, Barnes & Noble and

Hot Topic, all of which have stringent product specification and servicing requirements. As part of its expansion efforts, the Company added several new product lines such as precision machined dice, glossy solid color card sleeves and high-end messenger bags.

These changes and business expansions require additional training to ensure that all functions, from production and quality assurance, to packaging and sales, will work cohesively and effectively.

Modifications

The 97 trainees in Job Number 1 and Job Number 2 work in the City of Commerce, a High Unemployment Area (HUA) in Los Angeles County, with unemployment exceeding the state average by 25%. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department.

The Panel may modify wages for HUA workers by up to 25% of the ETP Standard minimum wage. For this project, however, Ultra Pro is requesting a wage modification of 25% for Job Number 1 and 19% for Job Number 2 in order to serve workers in lower-wage occupations at these locations.

Training Plan

In the prior ETP Agreement, Ultra Pro's focus was on reconfiguring its production capabilities of gaming accessories, to allow them to shift production from overseas back to California. The Company was also focused on implementing sales procedures to better serve their customers and distributors. As a result, the Company has become more competitive with other manufacturers in the industry.

The training for this Agreement is focused on new requirements and processes the company must meet to accommodate Ultra Pro's most recent changes, improvements and expansion. These opportunities require new product handling & fulfillment procedures, quality inspection requirements and vendor management software. In addition, Ultra Pro is now branching out beyond gaming accessories, by offering shoulder bags, wall decorations and plush toys.

Training will start upon Panel approval and will be provided at Ultra Pro's facility in the City of Commerce by a combination of in-house staff and trainers, and outside vendors.

Business Skills (25%): This training will be offered to Engineering, Administrative Staff and Supervisors/Managers. The development of skills and knowledge in general business, business development and sales processes allows employees with differing job functions to understand and appreciate how their work product is used by others within the Company. This training empowers employees to format, package and present their work in a better way to reduce downtime and human error.

Computer Skills (20%): This training will be offered to Engineering, Administrative Staff and Supervisors/Managers. The effective use of computers and computer software is critical in our daily operations. Ultra Pro has developed an in-house sale, marketing, inventory, customer service and customer relations management software that is customized to the Company's processes and needs. These customizations are dynamic and changes several times per week based on employee requests and general input. Training is a contiuous to ensure that employees remain current with the latest procedures and software to minimize downtime and redundant training.

Manufacturing Skills (25%): This training will be offered to Production Workers. In an effort to bring production back to the United States, Ultra Pro has continuously expanded and improved its manufacturing capabilities aiming for a faster turnaround time, higher rate of accuracy and better absorption of overhead costs. Trainees will develop new technical skills to keep pace with changes in product design and manufacturing processes. This will also provide the newly-hired employees with the skills to manufacture better quality products with higher accuracy.

Continuous Improvement (20%): This training will be offered to Engineering, Administrative Staff and Supervisors/Managers. As a manufacturer in a high-cost business environment, Ultrapro must strive to improve employees' efficiency and work effectiveness in order to remain competitive with out-of-state and international manufacturers. The training will enhance the level of output from each employee, while maintaining product quality and maximizing the production process.

Hazardous Materials (5%): This training will be provided to Production Workers, Engineering and Supervisors/Managers. This training will prepare employees to identify and read labeling of hazardous materials and have exposure awareness. The training will include identifying and reading information sheets containing the properties of chemicals that present a physical and environmental health hazard. Trainees will also learn protective measures and precautions for the handling and storage of hazardous materials.

Retrainee - Job Creation

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

In this proposal, Ultra Pro has committed to hiring 4 new employees (Job Number 2) as needed for its business expansion in term of market range and new products lines. Ultra Pro 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0248	Commerce	12/18/12-12/17/14	$99,320	$99,320 (100%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Workplace Efficiency
- Interpersonal Skills
- Intra-company Communication
- Retail Sales Channel Development
- Sub-distribution Sales Channel Development
- Monthly Account Forecasting
- Custom Orders Sales Development
- Printed Products Timeline Management

COMPUTER SKILLS

- Vendor Portal System (Amazon)
- Trading Partner Mgmt System (Hot Topic)
- RetailLink (Walmart)

CONTINUOUS IMPROVEMENT

- New Product Standards
- In-line QC Time Reduction
- New Process Procedure

HAZARDOUS MATERIALS

- Hazardous Material Management
- Material Safety Data Sheet (MSDS) Process

MANUFACTURING SKILLS

- Efficient Shipping & Receiving Procedures
- Manufacturing Procedures
- Material Inspection Procedures
- New In-line QC Requirements
- Heat Roller Press Work Center Procedures

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