



RETRAINEE - JOB CREATION

Training Proposal for:

Gallina LLP

Agreement Number: ET16-0346

Panel Meeting of: January 22, 2016

ETP Regional Office: Sacramento

Analyst: W. Sabah

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative	Industry Sector(s):	Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Placer, Sacramento, Contra Costa, Marin, San Mateo, Santa Clara, San Bernardino, Orange	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 168	U.S.: 209	Worldwide: 209
<u>Turnover Rate:</u>	13%		
<u>Managers/Supervisors:</u> (% of total trainees)	22%		See Project Details Section

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$173,190</td></tr> </table>	Program Costs	\$173,190	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(Substantial Contribution)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(Substantial Contribution)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(High Earner Reduction)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(High Earner Reduction)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$173,190</td></tr> </table>	Total ETP Funding	\$173,190
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In-Kind Contribution:	100% of Total ETP Funding Required	\$462,300
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Computer Skills, Cont. Imp.	133	8-200	0	\$1,230	\$17.50
				Weighted Avg: 82			
2	Retrainee Job Creation Initiative	Business Skills, Computer Skills, Cont. Imp.	12	8-200	0	\$800	\$23.00
				Weighted Avg: 40			

Minimum Wage by County: Job Number 1: \$15.60 in Placer and San Bernardino counties, \$16.10 in Sacramento County, \$16.51 in Orange County, and \$17.02 in Contra Costa, Marin, San Mateo and Santa Clara counties. Job Number 2 (Job Creation): \$12.77 in Placer and San Bernardino counties, \$13.42 in Sacramento County, \$13.76 in Orange County, and \$14.19 in Contra Costa, Marin, San Mateo 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		
Administrative Staff		13
Paraprofessional		5
Accounting Clerk		8
Accountant Level I		48
Accountant Level II		11
Manager I		9
Manager II		9
Senior Manager I		7
Senior Manager II		7
Human Resources Staff Level I		2
Human Resources Staff Level II		1
Information Technology Staff Level I		4
Information Technology Staff Level II		2
Marketing Staff		5
Marketing Business Development Staff		2

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 2		
Accounting Clerk		12

INTRODUCTION

Founded in 1972 and headquartered in Roseville, Gallina LLP (Gallina) (www.gallina.com) is an accounting, auditing and tax-consulting firm. Their services include industry-specific compilation, review and audit of financial statements. They also assist clients with corporate or general tax planning, cost segregation and analysis to improve probability, mitigate risks and manage growth. Their client base includes individuals and organizations across a variety of industries with a heavy focus in the construction, manufacturing and agricultural industries. Gallina has facilities in Placer, Sacramento, Contra Costa, Marin, San Mateo, Santa Clara, San Bernardino and Orange counties, all of which will participate in this training proposal. They have locations in other Western states, as well.

Need for Training

According to Gallina, they are one of the fastest growing firms in this field. The Company increased its geographic footprint throughout California and other Western states in the last few years. The Company is predicting further growth through the formation of “niche service” offerings and industry specialization. To handle the complexities of the growing firm, Gallina recently purchased a new ERP system and employees need training.

Gallina faces competition from local, national and international consulting firms. To remain competitive and to obtain new clients, the Company must provide Continuous Improvement training along with Business and Computer Skills. Training will allow employees to work together, deliver exceptional services, and retain long-term customers.

Retrainee - 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.

In recent years, Gallina has grown through acquisitions. In 2011, the firm grew at a rate of 31% and has grown at the same rate annually. Since then, the Company acquired three new firms and is continually evaluating potential professionals to join their firm. Recently, Gallina expanded their Southern California market by adding firms in Ontario and Newport Beach. These two locations, along with other California locations, require additional employees to support their growth and meet the demand of customers.

In this proposal, Gallina has committed to hiring 12 new employees (Job Number 2). Gallina 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

Trainees will receive between 8-200 hours of Classroom/Laboratory, Videoconference and E-learning training in the following:

Business Skills (20%): Training will be offered to all occupations to improve project management skills, customer service, presentation skills, and business operation skills. Training will include course topics such as Client Relationship and Management, Effective Presentation, Financial Services, Marketing & Support, Research Skills and Customer Product Knowledge/Improvements.

Computer Skills (40%): Training will be offered to all occupations to enhance computing abilities and increase knowledge of database creations, spreadsheets and reports in the new ERP system. Training will also focus on presentation development and social networking/marketing. Information Technology Staff will train in network design, network maintenance and program development. Training will include Accounting Research Manager, ADP Payroll, Checkpoint Tools, Cloud Computing, Salesforce, SafeSign, SQL Server Reporting Services and System Integration/Configuration.

Continuous Improvement (40%): Training will be offered to all occupations to develop staff's decision-making skills, improve business flow and encourage team collaboration. Trainees will learn to mentor colleagues and manage projects to remain focused on the Company's goals and leadership values. Training will include Building Effecting Teams, Efficiency and Quality Improvements, Managing Workflow and Scheduling, Project Management Skills, Team Building/Team Meetings and Leadership Essentials.

Managers/Supervisors

The trainee population includes a projected Manager/Supervisor ratio of 22%, which exceeds ETP's standard cap of 20%. Gallina is requesting a waiver to this cap due to the Company's square- business structure rather than the typical pyramid business structure of accounting firms. Having a square structure allows the Company to have more Managers able to work directly with employees to improve the quality of relationships and work products. Gallina's goal is to provide its Managers/Supervisors with the techniques to identify future leaders and the proper leadership skills to help the firm continuously grow and maintain a professional workforce. Training will improve the firms' ability to adapt to changing market conditions.

Commitment to Training

Gallina represents that ETP funds will not displace the existing financial commitment to training. The Company's annual training budget per facility is approximately \$140,000 and includes ethics training, workplace harassment prevention, and Continuing Professional Education courses for employees that would like to become CPA certified.

➤ Training Infrastructure

The Senior Manager will work with a team of three to five staff members to administer the ETP program. The Director of Recruitment & Development will oversee all training and ETP documentation for all employees company-wide. The team will work together to identify required training and work on administrative duties to complete the ETP project successfully.

Impact/Outcome

Gallina's dedication to training will allow them to successfully implement the new ERP system and improve leadership skills. Several trainees will also receive QuickBooks certifications.

LMS

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum**Class/Lab Hours/Videoconference/E-learning**

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Methods & Techniques
- Auditing Techniques
- Business Development/Cross-Selling Skills
- Business Etiquette
- Business Writing Skills
- Client Relationship and Management
- Communication and Presentation Skills
- Conflict Management/Risk Management
- Contract Management
- Customer Product Knowledge/Improvements
- Customer Service
- Effective Presentation
- Financial Services
- Foreign & Investment Taxation Techniques
- Human Resources Management & Planning
- Marketing & Support
- Negotiation Skills
- New Product Services
- New Tax Methods
- Planning & Support
- Proposal Writing/Report Writing
- Producing Documents
- Research Skills
- Taxes
- Technical Employee Orientation (tax & audit processes)
- Specific Systems and Best Practices

COMPUTER SKILLS

- Accounting Research Manager
- Adobe
- ADP Payroll
- Bloomberg BNA
- Checkpoint Tools
- Cloud Computing
- Cyber Recruiter Software
- Crystal Reports
- Database Tools
- Direct Access
- Finance/Accounting Tools
- Go File Room
- ProSystems
- Internet Tools/Web Tools/Database Tools
- Salesforce

- Learnlive Compliance System
- LastPass
- LinkedIn
- Microsoft Quickbooks
- Microsoft Office Suite (Intermediate & Advanced)
- Microsoft Dynamics
- NetSuite Systems Training
- Outlook
- Link (Instant Messaging)
- Vidyo (Video Conferencing)
- Peoplesoft
- PowerPoint Tools
- PPC SMART Practice Aid
- ProSystems Tools/Engagement
- Publisher
- RIA Research Integration
- SafeSign
- System Center Configuration Manager
- Security Training
- Sharepoint Design
- SilkRoad
- Social Media Tools (Facebook, Twitter, LinkedIn, Digital & Multimedia)
- STAR Network
- SQL Server Reporting Services
- System Integration/Configuration
- System Upgrade/New Systems Training
- Visual Practice Management

CONTINUOUS IMPROVEMENT

- Building Effective Teams
- Coaching – Delivering and Receiving Feedback
- Efficiency and Quality Improvements
- Managing Workflow and Scheduling
- Problem Solving/Process Improvement
- Project Management Skills
- Team Building/Team Meetings
- Leadership Essentials:
 - Being and Effective Team Member
 - Building Trust
 - Business Coaching
 - Effective Communication
 - Giving Feedback
 - Leading Teams: Management Essentials
 - Motivating and Inspiring Teams
 - Team Building

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