Training Proposal for:

Grossmont-Cuyamaca Community College District

Agreement Number: ET16-0211

Panel Meeting of: November 5, 2015

ETP Regional Office: San Diego

Analyst: K. Campion

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>New Hire</th>
<th>Industry Sector(s):</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Financial Services</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Insurance</td>
<td></td>
</tr>
</tbody>
</table>

Priority Industry: ☑ Yes ☐ No

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>San Diego</th>
<th>Repeat Contractor:</th>
<th>☑ Yes ☐ No</th>
</tr>
</thead>
</table>

Union(s): ☑ Yes ☐ No

Turnover Rate: N/A

Managers/Supervisors: (% of total trainees) N/A

### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$84,600</td>
<td>$5,400 8%</td>
<td>$90,000</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required N/A
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New Hire</td>
<td>Business Skills, Commercial Skills, Computer Skills</td>
<td>18</td>
<td>40 - 260</td>
<td>0</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $13.28 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

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

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>* Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting Assistant</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Bank Teller</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Customer Support</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Insurance Account Manager</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Insurance Agent</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Insurance Clerk</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Order/Shipping Clerk</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

* In no event will trainees earn 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.

**INTRODUCTION**

Founded in 1961 and located in El Cajon, Grossmont-Cuyamaca Community College District (Grossmont College) serves students throughout San Diego County. It offers more than 100 instructional programs for education and development courses; as well as programs that promote economic, civic, and cultural development. Grossmont College is accredited by the Accrediting Commission for Community and Junior Colleges of the Western Association of Schools and Colleges. ([www.grossmont.edu](http://www.grossmont.edu))

The Office Professional Training (OPT) program at Grossmont College’s Business Office Technology Department has been providing job training for unemployed individuals for 30 years. The OPT program is an industry-based, semester-long certificate program for new-hires.
All trainees are enrolled in core of business and computer skills classes designed to provide up-to-date skills and knowledge in the latest technologies. This specialized training program prepares unemployed individuals with the necessary skills for full-time, entry-level employment in accounting, insurance claims/assistance, and/or banking/financial services industries. The OPT matches each trainee with a prospective employer and has provided training and job placement services to more than 2,300 unemployed individuals in the San Diego business community since 1985.

PROJECT DETAILS

Employer Demand

Grossmont College’s Business Advisory Council (Council) will act as a liaison to their local business community. The Council reports to the OPT on an ongoing basis, concerning the demand for workers with entry-level skills and knowledge in insurance, banking/financial services, and accounting.

In regard to the occupations trained under this proposal, the Council reports as follows: Customer Support positions, particularly in insurance and banking/financial services, are expected to increase by 12.6 percent between 2012 and 2022. In the Accounting industry, Bookkeeping, Accounting, and Auditing Clerks are expected to increase by 11.4 percent during the same time period. This proposal will support the training and placement of 18 new-hire trainees in the aforementioned industries.

Marketing and Support Costs

The Council is comprised of private San Diego employers and city and county Human Resources representatives. In addition, the Council works with a Banking Advisory Board that includes several bankers and insurance industry representatives. Grossmont College recruits prospective employers with referrals from the Council and various advisory boards, and by conducting face-to-face presentations to human resources organizations in pertinent industry sectors.

Grossmont College has a full-time Job Placement Specialist who contacts and maintains relationships with employers to identify job openings and placement of trainees into full-time employment. Grossmont College requests the standard 8% support costs for outreach and recruitment of participating employers, to ensure trainees are placed with viable, ETP-eligible employers. Staff recommends the 8% support costs.

Trainee Recruitment

Grossmont College partners with the East County Career Center (ECCC), the local one-stop career center in East San Diego County and receives new hire referrals from ECCC. New hire trainees will also be recruited via local publications including Grossmont College’s website, the Grossmont College Schedule, the Preview, and the San Diego Reader. Local media also help to market the OPT program through TV coverage and articles in the San Diego Union-Tribune newspaper.
Training Plan

Training is scheduled to start immediately upon project approval, and the trainees will specialize in an occupational track: Banking/Financial Services, Insurance Claims/Assistance, or Accounting. New-Hire trainees typically have little to no job skills in the insurance or banking industries. Therefore, some trainees may receive up to 272 hours of training, of which a maximum of 260 hours will be reimbursed by ETP. Additionally, to ensure trainees are prepared to be placed into full-time employment, Grossmont College will provide resume writing techniques and interviewing skills for each trainee.

All training will be provided at Grossmont College’s Business Office Technology Department and will be conducted via class/lab in the following:

**Business Skills (26%)**: This training will be provided to all occupations to prepare trainees for entry-level full-time employment. Training topics include Business English and Communication, and Office Systems and Procedures.

**Commercial Skills (16%)**: This training will be provided to all occupations. Some trainees will study Insurance Principles; others will learn Accounting Principles or Banking/Finance Principles.

**Computer Skills (58%)**: All occupations will receive this training in one or more modules of MS Office Skills, Computerized Accounting Applications, Filing and Records Management and Social Media Skills for Business, as needed for entry level positions in Accounting, Insurance or Banking/Finance.

Project Administration

Grossmont College has three internal staff members dedicated to perform project administration including trainee recruitment; trainee needs assessments, and enrolling and tracking trainees in ETP’s on line systems.

Impact/Outcome

New-hire graduates of the OPT program may earn “Grossmont College Business Office Technology Certificates of Proficiency” based on academic performance. They also receive a Certificate of Completion from the OPT program upon job placement, and retention for 90 days.

Tuition Reimbursement

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

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by Grossmont College under an ETP Agreement that was completed within the last five years:
<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0340</td>
<td>San Diego</td>
<td>4/29/13 – 4/28/15</td>
<td>$80,000</td>
<td>$71,814</td>
<td>(89%)*</td>
</tr>
<tr>
<td>ET11-0224</td>
<td>San Diego</td>
<td>5/02/11 – 5/01/13</td>
<td>$66,384</td>
<td>$51,395</td>
<td>(77%)</td>
</tr>
<tr>
<td>ET09-0418</td>
<td>San Diego</td>
<td>1/26/09 – 1/25/11</td>
<td>$129,411</td>
<td>$38,344</td>
<td>(30%)</td>
</tr>
</tbody>
</table>

*ET13-0340 – As of the writing of this proposal, the final, closeout invoice is being processed by ETP. Contractor projects 100% earnings based on placement documents submitted to ETP.

ET09–0418 Grossmont College placed eight trainees into full-time ETP eligible employment, out of 27 planned trainees. The Contractor reports there were two reasons for the poor performance: 1) lack of a full-time Job Placement Specialist until the Fall of 2010; and 2) the poor economy and recession during 2009 and 2010 that resulted in fewer new jobs in San Diego County. The Contractor's performance for its subsequent ETP project, ET11-0224, improved significantly (see above) due to the addition of a full-time Job Placement Specialist on staff.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

40 – 260  Trainees may receive any of the following:

**BUSINESS SKILLS**

Business English and Communication

- Communication Skills
- Creating and Improving Business Messages
- Improving Writing Techniques
- Revising and Proofreading Business Messages
- E-Mail and Memorandums
- Direct Letters and Goodwill Messages
- Communicating for Employment

Office Systems and Procedures

- Office Ethics and Professionalism
- Prioritizing and Productivity
- Human Relations
- Working in Teams
- Customer Service
- Telephone Etiquette and Scheduling Appointments
- Using the Internet for Common Office Functions
- Changing Workplace
- Time and Stress Management
- Business Ethics
- Employment and Advancement
- Leadership and Management

**COMMERCIAL SKILLS**

Elementary Accounting

- Asset, Liability, Owner’s Equity, Revenue, and Expense Accounts
- T Accounts, Debits and Credits, Trial Balance, and Financial Statements
- The General Journal and the General Ledger
- Adjusting Entries and the Work Sheet
- Closing Entries and the Post-Closing Trial Balance
- Bank Accounts and Cash Funds
- Employee Earnings and Deductions
- Employer Taxes, Payments, and Reports
- The Sales Journal and the Purchases Journal
- The Cash Receipts Journal and the Cash Payments Journal
- Work Sheet and Adjusting Entries for a Merchandising Business
Introduction to Basic Insurance Principles

- Insurance Overview
- Insurance Marketing
- Insurance Services
- Underwriting Basics
- Claims Basics
- Insurance Coverages
- Personal Insurance
- Commercial Property Insurance
- Commercial Liability Insurance
- Premium Determination

Introduction to Banking/Finance Principles

- The Business of Banking
- Money and Interest
- Deposits in Banks
- Negotiable Instruments
- Bank Loans
- Mortgages
- Commercial Lending
- Specialized Bank Services
- Security, Fraud, and Ethics
- Bank Marketing
- Cash Handling
- Basic Accounting for Financial Services Representatives
- Cash Drawer Settlement
- Sales Techniques

COMPUTER SKILLS

- Keyboarding/document processing
- WORD Application Skills
- Excel Application Skills
- PowerPoint Application Skills
- Microsoft Access Application Skills
- Computerized Accounting Applications
- Filing and Records Management
- Outlook Navigation Skills
- Social Media Skills for Business

Note: Reimbursement for new hire training is capped at 260 total training hours per trainee.