



**Training Proposal for:  
Haskell & White LLP**

**Small Business**

**ET16-0435**

**Approval Date:** April 15, 2016

**ETP Regional Office:** San Diego

**Analyst:** K. Campion

**CONTRACTOR**

- Type of Industry: Services
  
- Priority Industry:  Yes  No
  
- Number of Full-Time Employees
  - California: 59
  - Worldwide: 59
  - Number to be trained: 59
  - Owner  Yes  No
  
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 2%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$49,324
- In-Kind Contribution: \$88,855

**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<br>SB <100 | Business Skills<br>Commercial Skills<br>Computer Skills | 59                        | 8-60                | 0   | \$836                    | \$16.46             |
|         |                      |   |                           | Weighted Avg:<br>38 |     |                          |                     |

- Reimbursement Rate: \$22 SB Non-Priority
- Counties: Orange, San Diego
- Occupations to be Trained: Admin. Staff, Operations Staff, Staff Accountant, Senior Accountant, Principal, Manager, Owner/Partner
- Union Representation:  Yes  
 No
- Health Benefits: \$1.51 per hour

**SUBCONTRACTORS**

- Development Services: Training Refund Group (TRG) in Anaheim assisted with development for a flat fee of \$3,000.
- Administrative Services: TRG will also provide administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1988, Haskell & White LLP, Certified Public Accountant and Business Advisors (Haskell & White) (<http://www.hwcpa.com>), is an independently owned accounting and business advisory firm in Southern California. The Company is headquartered in Irvine and also has an office in San Diego; both will participate in ETP-funded training. Haskell and White provides auditing, accounting, tax and business advisory services to real estate, manufacturing and distribution, life sciences, and technology companies.

**Need for Training**

The need for training is driven by Haskell and White’s continuous effort to expand its business. The Company has grown by 15% a year over the past several years. To continue this trend, the Company must provide customers with sound financial advice and tax planning strategies by keeping up with rapid changes brought about by industry and government.

The Company must also upgrade staff skills to improve processes and increase knowledge, as outlined in the Training Plan below.

### **Training Plan**

All training will be conducted via class/lab in the following:

**Business Skills** – Training will be provided to all occupations. Business Skills training will ensure that employees develop skills to provide quality customer service, deliver informed product presentations and recommendations, and manage project assignments efficiently. Some managers and leaders of the organization will receive Leadership and Managing Growth Skills to improve management skills at work and communication skills with clients.

**Commercial Skills** – Training will be offered to all occupations. The IRS and regulatory agencies are continuously changing compliance rules. Trainees need to understand changes in accounting and tax rules from year to year. They also have to understand the planning aspects of law changes or new interpretations of existing law in order to provide beneficial services.

**Computer Skills** – Training will be provided to all occupations. Trainees will learn Accounting and tax software application skills. Trainees will also receive MS Office skills to be able to create databases, spreadsheets, reports, charts, graphs, and professional presentation materials.

### **Request for Two-Year Contract Term**

The Company requests a 2-year term. Most training will only be delivered May–September and again from November–January during the off-peak periods. A two-year term would offer the Company more time to deliver training.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8–60

Trainees may receive any of the following:

**BUSINESS SKILLS**

- + Communication/Customer Service Skills
- + Conflict Resolution
- + Critical Thinking Skills
- + Leadership Training
- + Managing Growth
- + Marketing Skills
- + Networking Skills
- + Presentation Skills

**COMMERCIAL SKILLS**

- + Accounting & Auditing Update
- + Annual SEC Update
- + Best Practices & Projects
- + Municipal Bond Market Today
- + Tax Law Updates

**COMPUTER SKILLS**

- + Accounting and Process Software Application Skills
- + Intermediate and Advanced MS Office
- + Tax Software Application Skills

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