



**Training Proposal for:
Lavine, Lofgren, Morris, & Engelberg, LLP**

Small Business ≤ \$50,000

ET16-0198

Approval Date: September 24, 2015

ETP Regional Office: San Diego

Analyst: M. Ray

CONTRACTOR

- Type of Industry: Services

- Priority Industry: Yes No

- Number of Full-Time Employees
 - California: 44
 - Worldwide: 44
 - Number to be trained: 38
 - Owner Yes No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 7%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$17,556
- In-Kind Contribution: \$27,588

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 SB <100	Business Skills, Computer Skills, Continuous Impr	38	8-60	0	\$462	\$27.40
				Weighted Avg: 21			

- Reimbursement Rate: \$22 SB Non-Priority
- County(ies): San Diego
- Occupations to be Trained: Executive Staff, Staff Accountant, Accounting Manager, and Owner
- Union Representation: Yes
 No
- Health Benefits: \$0.96 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach will assist with development of this proposal for a flat fee of \$2,800.
- Administrative Services: TFS will also assist with administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1985, Lavine, Lofgren, Morris, & Engelberg, LLP (LLME) (www.llme.com) is an independent tax and accounting firm that provides tax, audit and attest, strategic consulting, and client accounting services to businesses of all sizes in a broad range of industries. Located in La Jolla, the Company has worked with clients representing the hospitality, real estate, construction, high technology, manufacturing, distribution, retail, sports, entertainment, and professional services industries.

Need for Training

LLME will begin to work through succession within the organization. The inevitable transition will require the Company to focus on enhancing leadership and management skills of its next generation workforce. To prepare, LLME must focus on workforce sustainability by developing training initiatives that will not only transfer leadership skills but also change the way the Company does business. To support this commitment, the Company plans to define and enhance training requirements for each job function to help facilitate skills and knowledge transfer, specifically for its leaders.

Further, the Company will be transitioning towards a paperless environment. LLME is committed to providing training and encouragement to its workers to embrace technology and implement new practices to reduce paper use. This technological transition will help save time and money, improve the security of documents, and increase customer satisfaction.

Training Plan

Training may be delivered through Class/Lab or E-Learning methods.

Business Skills – Training will be provided to all occupations. Training topics in Customer Service, Effective Presentations, Negotiation, and Marketing Skills will ensure that employees develop the skills to provide quality customer service, improve customer relationships, and deliver informed presentations and recommendations.

Computer Skills – Training will be provided to all occupations. Training in Go File Room (FirmFlow) will provide trainees the skills to electronically route all documents to automate business processes and streamline client engagement. Course topics also include Crystal Reports, Adobe, Database Tools, Microsoft Office, Quickbooks, and Sharepoint.

Continuous Improvement – Training will be provided to all trainees as it pertains to their job duties. Training in Managing Workflow, Team Building, and Problem Solving will allow trainees to identify obstacles, conflicts, and expected outcomes. Training will help the Company improve management skills, create a better work environment, and prepare for future personnel changes.

Special Employment Training

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.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab and E- Learning Hours

8 – 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Etiquette
- Business Writing Skills
- Client Relationship and Management
- Customer Service
- Effective Presentations
- Marketing & Support Skills
- Negotiation Skills

COMPUTER SKILLS

- Adobe
- Crystal Reports
- Database Tools
- Go File Room (Firmflow)
- Microsoft Office/Outlook
- Quickbooks
- Sharepoint

CONTINUOUS IMPROVEMENT

- Building Effective Teams
- Coaching – Delivering and Receiving Feedback
- Managing Workflow
- Problem Solving
- Process Improvement
- Team Building
- Leadership Essentials:
 - Being an Effective Team Member
 - Building Trust
 - Business Coaching
 - Effective Communication
 - Emotional Intelligence
 - Giving Feedback
 - Leading Teams: Management Essentials
 - Motivating and Inspiring Teams
 - Team Building

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