



RETRAINEE - JOB CREATION

Training Proposal for:

Mavenlink, Inc.

Agreement Number: ET17-0271

Panel Meeting of: October 28, 2016

ETP Regional Office: San Diego

Analyst: H. Bernard

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Technology/IT Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, San Francisco	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 149	U.S.: 167	Worldwide: 167
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	10%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$252,240		\$0	\$0		\$252,240

In-Kind Contribution:	100% of Total ETP Funding Required	\$474,250
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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 Priority Rate	Business Skills, Commerical Skills, Computer Skills, Continuous Impr, Mgmt Skills	152	8 - 200	0	\$720	\$17.00
				Weighted Avg: 40			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Commerical Skills, Computer Skills, Continuous Impr, Mgmt Skills	119	8 - 200	0	\$1,200	\$17.00
				Weighted Avg: 60			

Minimum Wage by County: **Job Number 1:** \$16.51 in Orange County and \$17.02 in San Francisco County; **Job Number 2:** \$13.76 per hour in Orange County and \$14.19 per hour in San Francisco 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

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Business Development		30
Small/Medium Business (SMB) Sales		45
Enterprise Sales		9
Marketing		16
Professional Services		25
Client Success		23
Finance/Accounting		8
HR/Administration		10
Management I		19
Management II		7
Client Support		7
Solutions Engineers		8
Senior Engineers		33
Junior Engineers		18
Design Staff		9
Product Staff		4

INTRODUCTION

Formed in 2008 and headquartered in Irvine with an additional facility in San Francisco, Mavenlink, Inc. (Mavenlink) is a high technology firm that provides Software as a Service (SaaS). This is a model whereby software is licensed and delivered on a subscription basis and is centrally hosted in the Cloud. With SaaS, the Company's customers can efficiently manage a project from start to finish with enterprise-grade, growth-management software and consulting. Mavenlink provides businesses with a complete view of operations by uniting project management, time tracking, resource planning and project financials in one place. The SaaS solution supports multiple platforms including smart phone, tablets, web-based applications and Mac and PC's. The Company primarily serves the service industry and includes large enterprises, mid-size businesses, non-profits, public administrations and small businesses.

Mavenlink meets out-of-state competition standards as an industrially-classified computer programming service.

PROJECT DETAILS

This will be Mavenlink's second project, and the second in the last 5 years. At the onset of the prior Agreement, the Company had only 52 full-time employees. ETP-funded training allowed the Company to focus on hiring and training new staff, most of which are now incumbent trainees in this proposal. The first ETP project focused on training new staff, particularly Engineering Staff, and enabled the Company to cross-train many of its customer service staff. Training allowed staff to promote or move to different positions that better suited their individual skills and interests. As a result, much of the current workforce must be trained in their new positions. Training for curricula incumbent staff will not be duplicated.

Mavenlink operates in an industry subject to rapid technological developments, evolving compliance standards, and changing customer demands. New software features are added weekly, and the Company's ability to compete in the marketplace is dependent upon introducing new software solutions in a timely manner while improving customer experience.

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.

Mavenlink has identified an \$8B market opportunity to become the pre-eminent provider of software solutions to professional services organizations across the globe. As a result, the Company is expecting to double its capital investments and workforce in the next two years. The Company has committed to hiring 119 new employees (Job Number 2) to new and existing functions. Trainees will receive extensive vocational skills as they will transition into their new positions within two weeks after their start date. New employees will be provided with at least 40 hours of training during the first two weeks, and these trainees will continue to receive additional training throughout the 21 month training period.

The date-of-hire for trainees 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.

Training Plan

Training will be provided by in-house trainers and vendors.

Business Skills (10%): Training will be offered to all occupations and will include client management skills and conflict resolution. Much of the training will focus on Sales Staff and Client Support for communication, presentation, and marketing skills.

Commercial Skills (40%): Training will be offered to all occupations. These skills will be vital for all employees and will include product knowledge. New employees will receive extensive training to orient them with the Company's tools and product lines. Topics will include product integrations, configuration/development of forms and Time, and expense tracking.

Computer Skills (35%): Training will be offered to all occupations. Mavenlink's product is software based. As such all occupations will receive training in Computer skills to ensure that staff can navigate products and services offered. The Company's Software and Product Development teams (Senior Engineers, Junior Engineers, Design Staff, Product Staff, Management, and Marketing) will receive the most training. Topics will include agile software development, web development, Javascript, coding and Technical Product Support.

Continuous Improvement (10%): Training will be offered to all occupations. Training will ensure that the Company is able to implement process and business improvement plans as it is rapidly expands.

Management Skills (5%): Training will be offered to Supervisors and Managers. Training will focus on leadership skills for the Company's management staff. Training will also include organizational strategy and design and process improvement skills to ensure that Mavenlink's leadership have the tools required to manage the growth of the Company.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Mavenlink currently has a training budget of \$100,000 annually for its San Francisco and Orange County locations. This includes new-hire orientation, product integration and off-site training for all teams.

ETP funds will allow Mavenlink to retain and attract high skilled employees and remain competitive in the technology sector. The Company views training as vital to its success and advancement, specifically in the San Francisco area. Because of the changing nature of Mavenlink's product offerings, it must provide continual training to ensure that it is at the forefront of the industry.

➤ Training Infrastructure

The Company's training department will administer the Agreement, spearheaded by the Senior Director of Training and Client Engagement. Training and administration will be managed out of Mavenlink's headquarters in Irvine by the staff that administered the prior ETP project. The Company expects to start training immediately after Panel approval.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0256	Irvine, San Francisco	08/04/2014– 08/03/2016	\$168,480	\$124,482 (74%)

*ET15-0256: Mavenlink has tracked a total of 5,121 eligible hours for 106 trainees. To date, Mavenlink has earned \$124,482 for 104 trainees. It is in the process of submitting the final closeout invoices for the remaining 2 trainees who completed training and the 90-day retention period. If all trainees meet the ETP retention requirements, the Company expects to earn approximately \$131,189, (78% of the Agreement amount).

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

- Business Analysis
- Marketing/Sales Skills
- Retention Skills
- Client Engagement & Management
- Communication Skills
- Conflict Resolution
- Presentation Skills
- Service Industry Best Practices

COMMERCIAL SKILLS

- Product Knowledge
- Project Management
- Business Intelligence Skills
- Good Data Product Reporting Tools
- Salesforce
- Mobile/Cloud Technologies
- Data Migration
- Software Integrations/Configuration/Development
- Custom Forms Configuration/Development
- Software Implementation
- Product Design/Implementation
- Technical Product Support
- Project Collaboration
- Out of Box Integrations (Google Apps, Pandexio, QuickBooks)
- Invoicing
- Master Planning, Resource Scheduling and Management
- Cost Margins
- Generating Reports and Analytics
- Customization of Mavenlink Within a Business
- Budgeting
- User Setup/Assigning Permissions
- Administrative Configuration
- Templates and Task Creation
- Chrome Applications
- Uploading/Sharing/Managing files within Mavenlink
- Account Reports
- Project Based Margin Reporting Support

COMPUTER SKILLS

- Advanced Software Design and Architecture
- Crystal Reports
- Ruby/Ruby on Rails
- HTML/CSS

- JavaScript and Many New Frameworks (e.g. JQuery, Backbone.js)
- Web Development
- Resource Optimization & Utilization Tracking
- Mobile Development
- Multiple XML/JSON API Integrations
- Live Deployments and Continuous Integration
- Staging/Production UNIX Environment Systems and Maintenance
- Agile Software Development
- Test-Driven Development
- Pair Programming
- Code Versioning and Pull Requests Best Practices
- Lean User Experience (UX)
- Systems Architecture
- Intermediate/Advanced Microsoft Office Skills
- MySQL
- Client Relationship Management (Salesforce.com)
- Mobile/Cloud Technology Skills
- Rapportive Application
- Yesware
- Tinderbox
- Google Mail
- New/Upgraded Software/Hardware
- Technical Product Support
- Software Integration Developments
- Logical Data Management
 - Netsuite
 - Intacct
 - Salesforce
 - Jira
 - Oracle
 - QuickBooks Enhancements
 - Custom Forms

CONTINUOUS IMPROVEMENT

- Strategic Planning
- Troubleshooting Skills
- Process/Performance Improvement Skills
- Team Building Skills
- Business Intelligence Skills
- Integrations/Configuration/Development

MANAGEMENT SKILLS (management trainees only)

- Leadership Development/Decision Making Skills
- Process/Performance Improvement Skills
- Organizational Strategy and Design

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