



**Training Proposal for:  
Mountz, Inc.**

**Small Business  $\leq$  \$50,000**

**ET15-0204**

**Panel Meeting of:** July 25, 2014

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** R. Jackson

**CONTRACTOR**

- Type of Industry: Manufacturing  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 40  
Worldwide: 65  
Number to be trained: 40  
Owner  Yes  No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 3%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$15,600
- In-Kind Contribution: \$18,420

**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 SB <100 Priority Rate	Manufacturing Skills, Continuous Improvement, Business Skills, Computer Skills	40	8-60	NA	\$390	\$16.25
				Weighted Avg: 15			

- Reimbursement Rate: Job #1: \$26 SB Priority
- County(ies): Santa Clara
- Occupations to be Trained: Owner, Supervisor, Sales Staff, Manager, Administrative Staff, Engineer, Technician, Machinist, Warehouse Staff, Clerk
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$1.61 per hour

**SUBCONTRACTORS**

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

**OVERVIEW**

Mountz, Inc. (Mountz), is a small business manufacturer that was established in 1965 in San Jose, Mountz provides torque tool solutions and metric fasteners to a variety of industries including aerospace, automotive, electronics, energy, medical, and packaging. The customer base is worldwide. The Company is ISO 9001 registered and ISO 17025 accredited. Tools made by Mountz are used to assemble a wide range of products such as computers, automobiles, defense equipment and medical devices.

Mountz has developed a new adjustable Torque Wrench that requires substantial training for staff. The Company recently incorporated a customer complaint system as part of Enterprise Recourse Planning (ERP). This requires training among all employees to document, analyze and address issues such as quality and delivery problems, order-entry and fulfillment errors and communications barriers.

Mountz is eligible as a NAICS approved entity under Out of State Competition provisions. As a manufacturer, the Company also qualifies for the priority reimbursement rate.

### **Training Plan**

Training is expected to be delivered by in-house subject matter experts in a classroom setting. Other training vendors may be identified at a later date.

**Manufacturing Skills** - Training will be delivered to Technicians. The skills being trained, including; production equipment and tools, material controls, and operations for production, and specialized manufacturing skills, are considered transferable within the industry and generally held to be skill upgrades for the workforce.

**Continuous Improvement** - All occupations will receive training applicable to their department and job function in an effort to streamline processes and procedures, upgrade skills, cross-train and ensure continued accreditation of a quality management system now in place. Staff will be able to make decisions and take immediate action, resulting in a greater attention to detail, error reduction, and a reduction in customer response time. This training is also designed to improve employee satisfaction. One component of the continuous improvement training involves converting packaging to eco-friendly materials to reduce waste and comply with customer requirements.

**Computer Skills** – Training will be delivered to all occupations to help the Company upgrade skills for processing customer orders and quality administration. A new ERP system is being used at the Company which requires training. Training in multimedia editing software will be offered to capitalize on technological advancements in order to improve marketing campaigns.

**Business Skills** – Training will be delivered to all occupations to enhance internal and external customer service quality and provide promotional readiness opportunities to employees. This will assist the Company to implement process improvements and achieve employee development goals.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

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

8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**

- + Motivation
- + Coaching
- + Leadership
- + Goal-Setting
- + Accounting (Finance Essentials, Financial Statement Analysis)
- + Project Management
- + Product Knowledge
- + Torque Seminar
- + Communication Skills (business writing, interpersonal skills)
- + Customer Service (Telephone skills, identifying customer needs, Resolving Customer Complaints)
- + Sales

**COMPUTER SKILLS**

- + ERP (Netsuite)
- + Intermediate Software Programs
- + Computer aided Design Program (Solidworks)
- + Digital Entertainment & Multimedia (film production/editing)

**CONTINUOUS IMPROVEMENT**

- + ISO 9001 / 17025
- + Root Cause Analysis
- + Internal Auditing
- + Inspection Best Practices
- + Production Scheduling
- + Inventory Control / Materials Management
- + Processes and Procedures
- + Engineering Change Notices
- + Environmental Best Practices (Green Business Techniques)
- + Teambuilding
- + Leadership Skills
- + Conflict Management

**MANUFACTURING SKILLS**

- + New Product Training
- + Inspection & Final Testing

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