



**Retrainee - Job Creation  
Training Proposal for:  
The Olivia Companies, LLC**

**Small Business ≤ \$50,000**

**ET16-0207**

**Approval Date:** September 29, 2015

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

**Analyst:** R. Jackson

**CONTRACTOR**

- Type of Industry: Services
  
- Priority Industry:  Yes  No
  
- Number of Full-Time Employees
  - California: 26
  - Worldwide: 26
  - Number to be trained: 29
  - Owner  Yes  No
  
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 5%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$43,428
- In-Kind Contribution: \$55,000

**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	Commercial Skills, Computer Skills, Continous Impr, Mgmt Skills	26	8-80	0	\$1,518	\$16.44
				Weighted Avg: 69			
2	Retrainee SB<100 Job Creation	Commercial Skills, Computer Skills, Continous Impr, Mgmt Skills	3	8-80	0	\$1,320	\$15.00
				Weighted Avg: 60			

- Reimbursement Rate: Job #'s 1 and 2: \$22 SB Non-Priority
- County(ies): San Francisco
- Occupations to be Trained: Owners, Administrative Staff, Operations, Sales & Marketing Staff, Managers, Executives
- Union Representation:  Yes  
 No
- Health Benefits: Job #1 only: \$1.66 per hour

**SUBCONTRACTORS**

- Development Services: SallyAnne Monti Consulting in San Francisco developed the proposal for a flat fee of \$2,600.
- Administrative Services: SallyAnne Monti Consulting will also provide administrative services for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

**OVERVIEW**

The Olivia Companies, LLC (Olivia), a woman-owned small business, was founded in San Francisco in 1973 as an independent record label for women artists. In 1990, Olivia added Olivia Cruise and Resorts to provide vacations exclusively for women. In 2002, Olivia expanded its travel services to include resort vacations, adventure trips, and high-end trips to such destinations as Galapagos Islands, Antarctica, and Africa. Olivia has one office in San Francisco.

**PROJECT DETAILS**

This will be Olivia’s third ETP Agreement, none in the last 5 years. (The previous project ended in March 2010.) Both previous ETP agreements included training on new product lines, web updates, reservation processes and the establishment of a formal training program. For this proposal, the Company will focus on new systems and services: RezMagic, a digital reservation system that was recently acquired; ActOn, an email system that allows the Company to measure email campaign effectiveness; Ambassador Program, a program that will help the Company monitor local markets; Solo’s Program, a program to help solo travelers save money; and Honeymoon Gift Registry, a service that allows friends and family of a couple to donate

towards a chosen honeymoon. Because training will cover new services and systems, training will not be duplicative of the previous Agreements.

Along with the new systems and services, Olivia has set goals of increasing the speed of service delivery by as much as 30% and doing more person to person marketing in a broader, but targeted market over the next 24 months skills. Additionally, a select group of future trainers will be trained by topic specialists whom will prepare the trainees to become future trainers in the Company's train-the-trainer program.

### **Retrainee - Job Creation**

In support of job creation, the Panel is offering 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.

With the creation of new services and the purchase of new systems, Olivia will need to expand business capacity. The Company has committed to hiring three new employees. The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

### **Training Plan**

Olivia's continued growth requires a focus on high-quality, intensive training that will provide workers with the technical skills to perform efficiently at high levels. Training will be delivered via Classroom/Laboratory and E-Learning.

**Commercial Skills** - Training will be offered to Sales & Marketing Staff and Operations. This training will allow Olivia to expand marketing research activities by 15% which is critical for targeting clients to solicit business. Training will also help the Company meet existing growth demands and expand sales.

**Management Skills** - Training will be offered to Managers only. Training will reinforce the Company's growth trajectory, providing leadership to support its goals of efficiency and skills upgrade.

**Computer Skills** - Training will be offered to all occupations. This training is critical to upgrade staff's technical skills navigating and utilizing new software. The skills will allow the Company to keep business strategies relevant and efficient, enabling the Company to adjust business based on verified market trends and performance based analysis.

**Continuous Improvement** - Training will be offered to all occupations. Training will ensure efficiency by reducing errors and expanding available resource utilization.

### **Modifications**

Olivia is requesting to increase the maximum hours per trainee from 60 hours to 80 hours to accommodate training on the many new systems and services as trainees will require extra training to reach competency.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

## **Exhibit B: Menu Curriculum**

### **Class/Lab & E-learning Hours**

8-80

Trainees may receive any of the following:

#### **COMMERCIAL SKILLS**

- ✚ Honeymoon Gift Registry
  - Product & Technical Skills Training
- ✚ Olivia Ambassador Program
  - Brand Recognition
  - Product & Service Driven Communication Skills
- ✚ Solos Program
  - Advanced Communication Skills
  - Dealing with Challenging Clients
  - Group & Event Coordination
  - Managing Client Expectations
  - Social Media and Internet Moderator Techniques

#### **COMPUTER SKILLS**

- ✚ Customer Relationship Management System (CRM)
  - RezMagic
- ✚ Intermediate/Advanced Microsoft Software Info Integration
- ✚ Marketing Management Software
  - ActOn

#### **CONTINUOUS IMPROVEMENT**

- ✚ Process Improvement for New Initiatives

#### **MANAGEMENT SKILLS** (Managers only)

- ✚ Managing Rapid Productivity Growth
- ✚ Strategic Planning for Executives and Owners

Note: Reimbursement for retraining is capped at 80 total training hours per trainee, regardless of the method of delivery.
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