



**Training Proposal for:
Phoenix Energy Technologies, Inc.**

Small Business ≤ \$50,000

ET16-0283

Approval Date: November 17, 2015

ETP Regional Office: San Diego

Analyst: M. Ray

CONTRACTOR

- Type of Industry: Technology/Other Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 32
Worldwide: 64
Number to be trained: 32
Owner Yes No
- Out-of-State Competition: Other: Company engaged within an industry identified to be facing out-of-state competition.
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 8%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$41,600
- In-Kind Contribution: \$66,347

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 SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	32	8 - 60	0	\$1,300	\$17.17
				Weighted Avg: 50			

- Reimbursement Rate: Job #1: \$26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Administrative Support, Customer Service, Sales/Marketing, Implementation Staff, Software Engineer, Analyst, Manager, and Owner
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Phoenix Energy Technologies, Inc. retained Training Funding Source (TFS) in Seal Beach to assist with development of this proposal for a flat fee of \$1,900.
- Administrative Services: Phoenix Energy Technologies, Inc. also retained TFS to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2004, Phoenix Energy Technologies, Inc. (PETI) (www.phoenixet.com) is a woman-owned, energy management consulting company that diagnoses opportunities and implements strategies to reduce energy consumption and costs. Located in Irvine, the Company's proprietary software provides real-time analysis and usage projections for energy conservation and equipment longevity. PETI provides energy and equipment monitoring, analysis, and response assistance to customers that include commercial accounts, national retail accounts, universities, and theme parks.

This will be the second Agreement between PETI and ETP within the last five years. In its first ETP project (ET14-0165), the Company provided training to 27 trainees who received between 18 to 120 training hours (81 average hours). Through this Agreement, PETI was able to

improve efficiencies throughout the organization and expand its products, services, and client base by providing its workforce with extensive business, commercial, computer, and continuous improvement skills training. Funding from the previous project allowed trainees to improve skills to support company expansion, increase productivity, and meet business needs.

Company representatives state that in order for PETI to continue to support business growth and maintain its place in the energy management industry, the Company must keep pace with developing innovations and emerging competitions. As a result, PETI must once again develop a new business plan to continue to focus on the improvement and enhancement of the Company's products and services. To do this, the Company implemented the Scrum Methodology. Scrum is an agile software development methodology that emphasizes collaboration, functioning software, team self-management, and the flexibility to adapt to emerging business needs. In addition to the software development methodology, the Company also projects to implement new and upgrade existing software systems such as Microsoft Azure, Microsoft Power BI, HTML 5 Web Programming, as well as other predictive analytics programs such as Statistical Analysis System (SAS) Software. Consequently, these new initiatives will require the Company to provide its workforce skills training to better understand the full capabilities of the new and upgraded programs in order to develop increased statistical information and successfully integrate these data with customer's technology and needs.

In addition, the proposed training plan will also build upon training that was provided in the previous project. Overall training will be driven by the industry, environmental, and customer demands to specifically minimize the carbon footprint and continue to curb energy costs. With the assistance of ETP funding, PETI is poised to deliver a comprehensive training program that will further enhance skills and knowledge of its workforce.

Training Plan

Business Skills – Training will be provided to all occupations. Course topics will include Customer Service, Change Management, Communication, Lead Generation, Product Knowledge, Sales/Marketing, and Project Management. Training will allow trainees to successfully improve leadership skills, departmental strategies, and product knowledge in order to keep pace with industry and customer demands.

Commercial Skills – Training will be offered to all occupations as it pertains to their specific duties. Training in Building Control Systems, Alarm Management, Environmental Applications, Grocery/Restaurant/Retail Energy Management, and Predictive Analytics will allow trainees to stay on trend with the latest development philosophies and advancements to address opportunities for future programs and services.

Computer Skills – Training will be offered to all occupations as it pertains to their job duties. Majority of the training will focus on the skills application of the new and upgraded software systems such as Scrum, Microsoft Azure, Microsoft Power BI, HTML 5 Web Programming, and SAS. Course topics also include Crystal Reporting, Building Control Systems, Analytics Software, and Trends Data Software. Training will provide trainees with skills to better understand technology and how to use information gathered to make predictions regarding energy use, purchasing, customer traffic patterns, store hours, weather conditions, and merchandising patterns.

Continuous Improvement – Training will be offered to all occupations consistent with their job duties. Course topics will include Critical Thinking & Efficiency Development, Client Operations, and Leadership & Mentoring Skills. Training will allow workers to expand emphasis on

corporate culture as well as develop cross departmental managerial partnering strategies to ensure employees are fully supported in different disciplines.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0165	Irvine	9/30/13 – 9/29/15	\$49,400	\$49,400 (100%)

Exhibit B: Menu Curriculum**Class/Lab Hours**

8 – 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Change Management
- Customer Service
- Communication
- Electronic Document Storage
- Electronic Document Sharing
- Financial Management & Administration
- HUD Web (internal communication program)
- Intranet Development/Structure/Processes/Updating
- Lead Generation
- Product Knowledge
- Project Management
- Risk Management
- Sales & Marketing
- Standard Work Procedures

COMMERCIAL SKILLS

- Alarm Management
- Building Control Systems
- Call Manager
- Comparative Values
- EDX
- Environmental Applications
- Fault Detection
- Grocery/Restaurant Energy Management
- HVAC Systems
- Predictive Analytics
- Refrigeration
- Retail Energy Management
- Statistics
- Third-Party Service Offerings

COMPUTER SKILLS

- Amazon-Cloud Web Services (AWS)
- Analytics Software Application Skills
- Angular Mobile
- Building Control Systems
- Cascading Style Sheets (CSS)
- Control Systems Software
- Crystal Reporting
- Expanded IT Programs
- HTML 5 Web Programming Application Skills
- J2

- Java
- JQuery
- Microsoft Azure
- Microsoft Office
- Microsoft Power BI
- Statistical Analysis System (SAS) Software
- Scrum Application Skills
- Server Query Language (SQL) Database Enterprise
- Sales Force
- Software Architecture Design
- Team Foundation Server
- Trends Data Software
- UX Design

CONTINUOUS IMPROVEMENT

- Critical Thinking & Efficiency Development
- Client Operations
- Leadership & Mentoring Skills
- Phoenix Products
- Review Process

Safety Training will be limited to 10% of total training hours, per-trainee.

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