



**Training Proposal for:
 Regents of the University of California
 Agreement Number: ET15-0258**

Panel Meeting of: July 25, 2014

ETP Regional Office: Sacramento

Analyst: W. Atkinson

PROJECT PROFILE

Contract Attributes:	Retrainee Entrepreneurial SET	Industry Sector(s):	Services Construction Technology/IT Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Madera, Tulare, Kings, Stanislaus, Tuolumne, Merced, Mariposa, Kern, Inyo, Mono, Monterey, San Benito, San Luis Obispo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	N/A		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$55,400		\$3,828 8%		\$59,228

In-Kind Contribution:	50% of Total ETP Funding Required	N/A
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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 SET Entrepreneurial	Business Skills	48	8-60	0	\$1,176	N/A
				Weighted Avg: 50			
2	Retrainee SET Entrepreneurial Priority Rate	Business Skills	2	8-60	0	\$1,390	N/A
				Weighted Avg: 50			

Minimum Wage by County: There is no minimum wage requirement for SET Entrepreneurial trainees.

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
Small Business Owner		50

INTRODUCTION

Regents of the University of California (Regents) is a non-profit agency that will provide entrepreneurial training through the University of California Merced Small Business Development Center (Merced SBDC) Regional Network. Established in 2003 and serving 14 Central California Counties, Merced SBDC consults and trains entrepreneurs and small businesses and provides access to information and tools necessary to build successful sustainable businesses. In 2013, the network generated \$56 million in new capital investment, and provided assistance to 1,873 clients, which created 124 new businesses and 528 jobs.

The Merced SBDC Regional Network Office includes the following five Small Business Development Centers: Fresno State SBDC; Alliance SBDC; CSU Bakersfield SBDC, CSU Monterey Bay SBDC, and Cal Poly SBDC. Training will be conducted at all five SBDC centers.

Special Employment Training

Regents seeks Special Employment Training (SET) funds to train small business owners and entrepreneurs. For entrepreneurial training, post-retention wages are not required since business owners typically do not receive an hourly wage. UC Merced SBDC is proposing to provide training for 50 small business owners in priority and non-priority industry sectors.

PROJECT DETAILS

Training is designed to help very small business owners improve their business operations, finances, planning, customer service, marketing, and sales. Courses and workshops were developed using Kauffman FastTrac® materials and key stakeholders, advisory board and participant feedback. Training will help business owners with business decisions and financial management practices and help them develop a business model that utilizes sound research to provide sustainable market driven strategies.

Training Plan

Business Skills (100%) - Training topics will include creating profitable growth, strategic planning, market research for growth, setting the right price, financial statements, budgeting for growth, managing cash flow, and access to capital and credit management. This training is intended to provide business owners the opportunity to analyze their businesses; evaluate growth; determine strategies to achieve desired goals; streamline the business to operate efficiently; provide expertise for in-depth analysis of financial needs; and create a framework to sustain maximum profitability for long term growth.

Training Coordinator

The five center directors and key consultants have been trained and are certified to deliver the Kauffman entrepreneurial training materials. In addition 11 staff (Directors and Administrative Assistants at each SBDC, plus 1 at the lead office) will be dedicated to project administration, scheduling training, needs assessment, recruitment, and marketing.

Marketing and Support Costs

Regents markets the program through community partnerships, email blasts, advisory boards, and existing clients. Regents also co-sponsors and advertises workshops with key stakeholders within the California State University system, local Workforce Investment Boards, and local Economic Development Centers.

Regents is requesting 8% support costs to ensure ongoing marketing and recruitment efforts toward employer recruitment and needs assessment. Staff recommends the 8% support costs requested.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Creating profitable growth and the entrepreneurial mindset
- Strategic planning, setting goals and objectives
- Creating business plans and doing feasibility studies
- Understanding the internal and external uses of a business plan
- Market research for growth opportunities
- The importance of networking
- How your business structure affects your growth options
- Legal issues that affect growing businesses
- Managing the risks of growth
- Building, motivating and managing teams
- Outsourcing and growth
- The impact of marketing on profitability
- The need for market analysis
- Identifying new markets and competitors
- Understanding social media as a mechanism to market and grow your business
- Balancing the four Ps
- Building a global brand
- Setting the right price in new markets
- Maintaining excellent customer service during business growth
- Choosing the right promotional tools for your growing business
- Online marketing, sales and relationship management
- Financial statements and their uses
- How accounting systems guide growth
- Preparing a personal financial statement and current business balance sheet
- Using ratios to analyze balance sheet information
- Quickbooks training
- Examining bookkeeping and recordkeeping activities and controls
- Budgeting for growth
- How budgets provide performance feedback
- Reviewing and adjusting budgets
- Calculating the break-even point for your growth opportunity
- Managing your cash flow cycle
- Internal controls for cash management
- Monthly and annual cash flow projections
- Preparing the monthly projected income statement and understanding how it differs from the cash flow projection
- Developing a projected balance sheet and comparing it with the beginning balance sheet
- Understanding the statement of owner's equity and annual statement of cash flows
- Managerial uses of financial statements
- Access to capital and credit management
- Debt and equity financing for growth opportunities

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Regents of the University of California

CCG No.: ET15-0258

Reference No: 13-0543

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Alliance Brokers & Consultants, Inc. / Clayton Koerner

Address: 5301 Office Park Dr. #200

City, State, Zip: Bakersfield, CA 93309

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: Annabelle's Bridal Boutique

Address: 200 W. Main Street

City, State, Zip: Visalia, CA 93291

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

Company: Ayala Family Dentistry / Dr. Denise Ayala

Address: 716 Garner Avenue, Suite 101

City, State, Zip: Visalia, CA 93230

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Bay Property Management / Gail Valdez

Address: 140 John Street

City, State, Zip: Salinas, CA 93901

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

**Participating Employers in Retrainee
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Company: Best Friend Pet Resort / Augusta Farley

Address: 2631 Olive Avenue

City, State, Zip: Patterson, CA 95363

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: Breen Law Firm

Address: 330 Tres Pinos Street F84

City, State, Zip: Hollister, CA 95023

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Center for Integrated Medicine / Dr. Kar Kwon

Address: 725 W. Main Street

City, State, Zip: Visalia, CA 93291

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Classic Lube & Auto Care

Address: 3321 Coffee Rd.

City, State, Zip: Bakersfield, CA 93308

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 3

Total # of full-time company employees in California: 3

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Regents of the University of California
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Company: Cole Video

Address: 1 E. Linoberg

City, State, Zip: Sonora, CA 95370

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Comforting Assistance / Bertha Garza

Address: P.O. Box 866

City, State, Zip: Three Rivers, CA 93721

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Creative Flowers Under the Arbor's Edge

Address: 124 N. Willis

City, State, Zip: Visalia, CA 93291

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: D & S Service Center / Santos Prado

Address: 2500 E. Main

City, State, Zip: Visalia, CA 93292

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

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Company: Dr. Mylene Rucker

Address: 2305 W. Midvalley Ave.

City, State, Zip: Visalia, CA 93292

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Fallon Electric

Address: 26413 Birch Place

City, State, Zip: Carmel, CA 93923

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

Company: From Granny's Heart Quilts

Address: 1033 Georgia Avenue

City, State, Zip: Madera, CA 93637

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Grilled Cheez (Juan Ortega)

Address: 2088 W. Shaw 103

City, State, Zip: Fresno, CA

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

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Company: Joseph Velasquez (VAPROz)

Address: 17448 Harvest Grove

City, State, Zip: Bakersfield, CA 93314

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Kenyon Enterprises

Address: 4205 Resnick Ct.

City, State, Zip: Bakersfield, CA 93313

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Le Mejor / Rosa Vasquez

Address: 2401 W. Caldwell

City, State, Zip: Visalia, CA 93271

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

Company: Light and Shadow Fine Art

Address: 6th Street

City, State, Zip: Carmel by the Sea, CA 93921

Collective Bargaining Agreement: N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

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Company: MVP / Eddie Perez

Address: 3924 Caldwell Avenue, Suite B

City, State, Zip: Visalia, CA 93277

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Navo Financial

Address: 2045 S. Court Street

City, State, Zip: Visalia, CA 93277

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 3

Total # of full-time company employees in California: 3

Company: Pauls Glass Company

Address: 240 S. First Street

City, State, Zip: Turlock, CA 95380

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

Company: The Ruby Slipper Performing Arts Academy / Adrienne Terry

Address: 113 S. Willis

City, State, Zip: Visalia, CA 93291

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

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Company: Pizza Factory

Address: 926 S. Main Street

City, State, Zip: Salinas, CA 93901

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Physius / Dr. Marco Silveira

Address: 716 Garner Avenue, Suite 103

City, State, Zip: Hanford, CA 93230

Collective Bargaining Agreement: N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Rich's Auto Glass

Address: 3001 Auto Mall Dr. #130

City, State, Zip: Bakersfield, CA 93313

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Slick Fish Marketing / Donna Fischman

Address: 122 E. Tehachapi Blvd. Ste.C

City, State, Zip: Tehachapi, CA 93561

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

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Company: SOS Recycle LLC / Day Smith

Address: 6405 Manchester Lane

City, State, Zip: Bakersfield, CA 93309

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

Company: Stanislaus Audio Video / George Turner

Address: 1431 Kansas Avenue

City, State, Zip: Modesto, CA 95351

Collective Bargaining Agreement: N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: State Farm / James Banks

Address: 1525 Columbus

City, State, Zip: Bakersfield, CA 93305

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: State Farm / Karen Gross

Address: 1505 N Dinuba Boulevard

City, State, Zip: Visalia, CA 93291

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

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Company: TGN Distributing / Mark Hull

Address: 130 E. Maple St.

City, State, Zip: Exeter, CA 93221

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: The Home Company

Address: 619 Foster Avenue

City, State, Zip: Madera, CA 93637

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Torian Group / Tim Torian

Address: 621 Willow

City, State, Zip: Visalia, CA 93293

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

Company: Uncle Lisa's Creative Cake's

Address: 512 Madera Avenue

City, State, Zip: Madera, CA 93637

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

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Company: VIP Floorcare Inc.

Address: 1025 Fulton Mall #208

City, State, Zip: Visalia, CA 93292

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Warren's Automotive

Address: 501 W. Ridgecrest Blvd

City, State, Zip: Ridgecrest, CA 93555

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7
