



**Training Proposal for:
The Rocher Group A.P.C.**

Small Business \leq \$50,000

ET15-0110

Panel Meeting of: June 27, 2014

ETP Regional Office: North Hollywood **Analyst:** E. Fuzesi

CONTRACTOR

- Type of Industry: Financial Services
 - Number of Full-Time Employees
 - California: 5
 - Worldwide: 5
 - Number to be trained: 5
 - Out-of-State Competition: No OSC
 - Special Employment Training (SET): Yes No
 - High Unemployment Area (HUA): Yes No
 - Turnover Rate: 0%
 - Repeat Contractor: Yes No
- Priority Industry: Yes No
- Owner Yes No

FUNDING

- Requested Amount: \$6,600
- In-Kind Contribution: \$7,458

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 SET	Business Skills, Computer Skills, Cont. Impr., Mgmt. Skills	3	8-80	0	\$1,320	\$27.09
				Weighted Avg: 60			
2	Retrainee SB <100 SET HUA	Business Skills, Computer Skills, Cont. Impr., Mgmt. Skills	2	8-80	0	\$1,320	\$24.04
				Weighted Avg: 60			

- Reimbursement Rate: Job #'s 1 & 2: \$22 SB Non-Priority
- County(ies): Los Angeles
- Occupations to be Trained: Accountant, Manager, Owner
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

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

OVERVIEW

The Rocher Group A.P.C. (Rocher), founded in 2008, is a Certified Public Accountant (CPA) and business management firm in Los Angeles. Rocher offers a wide range of services for employers, domestic partnerships, and individual clients including accounting functions, business forecasting, CFO services, consulting, tax audits and preparations. Clients seek consultation from Rocher in various industries such as multimedia, retail, hospitality, manufacturing, Information Technology, professional services, real estate, interior design, and healthcare. Over 60% of Rocher’s clients are employers in the above industries, and the remaining 40% are business owners and other individuals who are experiencing challenges with their state and federal tax returns.

Rocher is currently outpacing the national average in annual revenue percentage increase within the accounting services industry. To move Rocher to the next sustainable level, they have identified the need for staff development to strategically manage growth, and to develop staffs' technical and soft skills. These actions would stimulate job creation, and provide career advancement for current employees. New technologies and software applications have emerged for CPA's that are invaluable and will better assist the firm's employer-clients in managing their businesses more effectively.

Due to a recent growth within the Company, Rocher has several newly-hired staff members. Many of which have been in their current position for less than two years. The majority lacks the latest computer and software skills and experience to service clients efficiently, impacting the amount of billable hours generated. To effectively implement its marketing plan, and sustain growth staff and management need professional development.

Special Employment Training

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees in non-priority industries must be earning at least the statewide average hourly wage at the end of the retention period.

HUA Wage Modification

All trainees work in the city of Los Angeles, a region with unemployment exceeding the state average by at least 25%, which qualifies for HUA status under these standards. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Rocher is requesting the HUA wage modification from the Statewide Average Hourly Wage of \$27.09 to \$24.04 for the two trainees (Accountant, Manager) identified in Job Number 2 only.

Contract Term Limitation

Rocher is requesting a 24-month contract term due to the seasonal work of a CPA firm. The Company would not be able to accomplish their training plan in the traditional 12 months because they need to devote at least three months of the year to only servicing clients during "tax season".

Training Hours Limitation

Rocher is requesting an increase in the cap from 60 to 80 Class/Lab hours per trainee. The additional hours will allow for more in-depth training in Business Skills, Computer Skills, and Continuous Improvement.

Training Plan

Business Skills (40%) – This training will be offered to all staff to improve business performance by incorporating new accounting systems and financial strategies to improve current employer-client relations. The training in Customer Service and Customer Relations will help staff to provide "World Class" customer service as exemplified by Rocher's benchmarks. Staff development in Business Skills will also increase the Company's client-base by effectively implementing marketing plans as well as increase product knowledge to offer current clients additional services that will contribute to additional billable hours, higher quality service to clients, and to service new clients. Training will also focus on interpersonal skills internally

which will make for a smoother transition to a “Pod Structure” in which a senior employee is teamed with a junior colleague to enhance client services.

Computer Skills (40%) – This training will be offered to all staff to gain and apply state-of-the-art accounting software skills that are demand driven in this industry. By incorporating the latest software applications and systems such as client management, production and scheduling in the daily work flow, it will vastly improve the timing and turnaround time of current client management processes. This will allow Rocher to more effectively manage current employer/client needs, follow-ups, and provide value-added services as well as efficiently transition new clients into the system.

Continuous Improvement (15%) – This training will be offered to all staff to support clients and staff with the best available service opportunities and practices. Rocher is committed to improving the soft and hard skills of staff and management. Quality and accuracy being the greatest importance to stay competitive, Rocher must focus on quality issues and creatively find solutions to enhance services and product delivery.

Management Skills (5%) – This training will be offered to Management and the Business Owner. To sustain growth, Rocher must focus on skills that will increase leadership capabilities and to provide a solid career ladder for current staff. Rocher is implementing new titles, team structures, and other policies and procedures to support growth, Leadership, Team Building, Coaching, Decision Making, and Motivation courses that will support the new initiatives to be implemented throughout 2014-15.

RECOMMENDATION

Staff recommends approval of this proposal including the wage modification, additional training hours, and the contract term extension.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-80 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Systems
- Business Administration
- Business Performance
- Customer Complaints
- Customer Relations
- Customer Service
- Financial Strategies
- Handling Customer Requests
- Interpersonal Skills
- Marketing
- Payroll Systems
- Product Knowledge
- Project Management
- Report Writing and Editing

COMPUTER SKILLS

- Accounting Software Applications
- Client Management System
- Cost Accounting
- General Accounting
- Payroll
- Production and Scheduling Software Application

CONTINUOUS IMPROVEMENT

- Coaching
- Decision Making
- Leadership Skills
- Motivation
- Problem Solving
- Process Improvement
- Production Operations/Workflow
- Production Scheduling
- Quality Concepts
- Teambuilding

MANAGEMENT SKILLS (Office Manager & Owner only)

- Coaching
- Decision Making
- Leadership
- Motivation
- Team Building

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