



RETRAINEE - JOB CREATION

Training Proposal for:

Sungevity, Inc.

Agreement Number: ET15-0372

Panel Meeting of: January 22, 2015

ETP Regional Office: San Francisco Bay Area

Analyst: A. Nastari

PROJECT PROFILE

Contract Attributes:	Priority Rate Job Creation Initiative Retrainee	Industry Sector(s):	Services Green Technology Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 436	U.S.: 471	Worldwide: 471
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$334,776</td></tr> </table>	Program Costs	\$334,776	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">(Substantial Contribution)</td> <td style="text-align: center;">(High Earner Reduction)</td> </tr> <tr> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> </tr> </table>	(Substantial Contribution)	(High Earner Reduction)	\$0	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$334,776</td></tr> </table>	Total ETP Funding	\$334,776
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In-Kind Contribution:	100% of Total ETP Funding Required	\$388,945
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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 Priority Rate	Business Skills Computer Skills	143	8 - 200	0	\$432	\$17.74
				Weighted Avg: 24			
2	Retrainee Priority Rate Job Creation	Business Skills Computer Skills	195	8 -200	0	\$1,400	\$17.74
				Weighted Avg: 70			

Minimum Wage by County: Job Number 1: \$16.44 for Alameda County; Job Number 2(Job Creation): \$13.70 for Alameda County

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

Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Design & Engineering Staff		11
Field Managers		16
Rebate and Interconnection Staff		10
Remote Solar Designers		25
Retail Solar Advisors		10
Solar Consultants		23
Technical Sales Staff		48
Job Number 2		
Design & Engineering Staff		14
Field Managers		29
Rebate and Interconnection Staff		10
Remote Solar Designers		36
Retail Solar Advisors		10
Solar Consultants		61
Technical Sales Staff		35

INTRODUCTION

Founded in 2010 and headquartered in Oakland, Sungevity, Inc. (Sungevity) (www.sungevity.com), provides services to residential homeowners in photovoltaic solar lease and purchase programs. Customers can sign a 20-year lease or purchase a solar system. While Sungevity does not manufacture solar panels, it does market, design, and provides customer support. Sungevity has developed a propriety online system, iQuote. This system allows interested customers to request a quote, and through satellite imagery, can review a rendering of solar panel layout on their roofs, without a home sales visit. The system provides customers estimates of monthly electricity charges. Sungevity uses installers who are experienced in installation processes using efficient and quality techniques.

Sungevity has been expanding its services nationally and globally through a partnership with SunRun, a company that purchases and services the solar panels installed by Sungevity. SunRun also monitors the solar system's performance and guarantees its production. Sungevity also collaborated with Lowe's Home Improvement Centers, providing on-site knowledgeable sales staff to address customer's questions on all aspects of the solar market. The sales staff also guides customers through Sungevity's iQuote system.

Sungevity needs to train existing staff on updates to its iQuote system, recent advancements within the energy conservation industry specific to the benefits of a solar powered system and the options available to customers in design aesthetics resulting from new technological advancements. Sungevity must also train workers on new financial services available through its partnership with SunRun.

Retrainee - Job Creation

The Panel offers 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.

Sungevity has committed to hiring 195 new employees (Job Number 2). Trainees must be hired within the four-month period prior to Panel approval or during the term of contract. [Note: The usual date-of-hire "window period" for this program is three months. In this case, because the proposal was held over due to cancellation of the Panel meeting in December 2014, and the Company has already started hiring, staff recommends extending this period by one additional month.] These trainees will be hired into "net new jobs" as a condition of contract.

To address business growth needs, Sungevity has been actively expanding its workforce. From 2012 to 2013, the Company doubled its workforce. By 2014, the Company increased its workforce yet another third. Sungevity's past hiring record supports its projected number that it will hire during the Agreement term.

In August 2014, Sungevity opened its second office in Fremont, specifically dedicated to its software development. The newly hired trainees will be placed at its Oakland and Fremont facilities, and Lowe's retail centers throughout California.

PROJECT DETAILS

Sungevity requests ETP funds to assist with the training in the solar technology and Company services, including financial options and installation, Sungevity's iQuote program, and software programs for the design and engineering of custom solar panels. The majority of training will be delivered to newly hired workers, while existing staff will be trained on updated processes and product design. Sungevity must also train workers on SunRun's programs and financial services.

Solar financial packages and services change constantly as new incentives or financing options become available.

Green/Clean Operations

All training will be in Sungevity's green solar operations, technology, and product design required for the sales, marketing, and design of its customized solar projects.

Training Plan

Sungevity will deliver class/lab training in Business and Computer Skills in the following:

Business Skills (50%): Training will be offered to all occupations in all aspects of the solar industry, product knowledge, sales skills, and the solar industry standards.

Computer Skills (50%): Training will be offered to all occupations in the Company's technologies/software including Jaspersoft, Adobe Pro, ABS, PALO, Showcase Application, Xora, SalesForce, and Google Earth.

Commitment to Training

Sungevity's 2015 training budget is estimated at \$223,350 and \$244,053 for 2016. The budget covers mandatory New Employee Orientation, a 14-hour introduction to Sungevity, solar energy, PV installation and ne- metering followed by job-specific training. All employees receive product knowledge, updates in solar industry standards, ethics, diversity, company policies and procedures, and elective training in North American Board of Certified Energy Practitioner certification.

Sungevity represents that ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

To ensure a successful ETP project, a dedicated training member has been identified from each department of the following departments: Technical Sales Associate, Retail Solar Advisor, Field/Project Managers, Remote Solar Designer, Rebate & Interconnection, and Solar Consultant. Each department training leader will be responsible for ensuring that new workers receive the training specific to their job functions. Sungevity also has a staff person who will be dedicated to scheduling training, enrolling trainees, tracking training hours, and meeting with ETP staff.

Other Resources

Sungevity is taking advantage of Enterprise Zone (EZ) credits as a pre-profit company. The Company may claim these credits for being located in a specific area zip code. Although the Company qualified for the credits, Sungevity is not yet using them.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

ADP in San Dimas assisted with development of this proposal for a flat fee of \$7,000.

ADMINISTRATIVE SERVICES

ADP will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- NEC Code Knowledge
- Sungevity Design & Install standards
- Review of DAE Process
- Leading the Call (Tone, Content and Questions)
- Converting Leads and the Opportunity
- Headlands Phone System
- Solar 101
- Clearslide & Headlands
- Solution Selling I – Intro to Sales Philosophy
- Solution Selling II – Intro to Sales Presentation
- Home Energy Use
- Rate Structures & Solar Advantage
- Solution Selling IV – Island 1
- Art of the Soft Close
- Sales Techniques
- Cash Purchase & Solar Lease
- Bill Review
- Solar 101 – Scripting
- Home Review, System Selection
- Gas Analogy & Price Conditioning
- Legal Walkthru I – Lease Agreement
- Legal Walkthru II – Performance Guarantee
- Legal Walkthru III – Cash Contract
- Project Management
- Contracts and Qualifications
- Contract Re-Pricing and Regeneration
- Pricing Methodology
- Underwriting Guidelines
- Fund Specifics
- PV 101 and Introduction into Remote Solar Design (RSD)
- Grid Direct System Terminology
- Sungevity & Solar Abbreviations and Email Protocol
- Introduction to the Lowe's Program
- RSA Training
- Showcase Application
- TSA Training
- Solar Consultants and their Processes
- Expense Report Entry
- Modules & Inverters:
 - ❖ Stringing
 - ❖ Array Layout

- Fire Guidelines
- DC Combiners
- DC Disconnects
 - ❖ Roof Top
 - ❖ Rapid Disconnect at Array
- AC Disconnects
- PV Meters & Monitoring
- Point of Connection:
 - ❖ Order of POC Preference
 - ❖ Load Centers:
 - Existing Tie-In
 - New AC Combiner
 - New w/Transferred Loads

COMPUTER SKILLS

- DAE Tools:
 - ❖ String Sizer
 - ❖ Landscape Modules
 - ❖ Available Modules
 - ❖ Special Order Items
- Introduction to Satellite Data System
- Introduction to CAD:
 - ❖ Tutorial
 - ❖ Set-Up CAD Workstation
 - ❖ Shortcut Commands
 - ❖ Tool Palettes & Dynamic Blocks
 - ❖ Templates
 - ❖ Dimensioning & Annotative Scaling
- DAE Process Flow:
 - ❖ Drafting
 - ❖ Pre-Design
 - ❖ CAP
 - ❖ HVKB
 - ❖ QC
- Intro to Box:
 - ❖ Navigation
 - ❖ Functionality
 - ❖ Sharing
 - ❖ Sync
- Jaspersoft
- Adobe Pro
- ABS Report to Identify the Discrepancy Between Plan Set and as Built
- Showcase Application
- Xora
- SalesForce:
 - ❖ Intro to Salesforce
 - ❖ Salesforce Analytics, Workflow
 - ❖ AHJ & Utility Objects
 - ❖ Project
 - ❖ Iquote

- ❖ System
- ❖ Searches
- ❖ Reports/Dashboards
- ❖ Tasks/Modification of Systems, Arrays and Adders
- ❖ Introduction to Listviews
- ClearSlide
- iQuote
- Google Earth:
 - ❖ Introduction into Slar Access & Sun Paths
 - ❖ Explore Google Earth and GESV
- RSD Tool – Design Tool
 - ❖ Introduction to Remote Solar Design Tool
 - ❖ Modeling Flat Roofs
 - ❖ Gable Design
 - ❖ 2D Modeling
 - ❖ Accurately Estimate SV Solar Access
 - ❖ Pitched Roof Modeling
 - ❖ Max Consumption Designs and RSD limitations
 - ❖ Clay Tile Roof Adder and Calculations

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.