



Training Proposal for:
Trinity Property Consultants, LLC
Agreement Number: ET15-0268

Panel Meeting of: August 22, 2014

ETP Regional Office: San Diego **Analyst:** J. Davey

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative	Industry Sector(s):	Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Alameda, Contra Costa, Los Angeles, Monterey, Orange, Riverside, Sacramento, San Bernardino, San Diego, Santa Barbara, Santa Clara	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: 225	U.S.:641	Worldwide: 641
<u>Turnover Rate:</u>	18%		
<u>Managers/Supervisors:</u> (% of total trainees)	19%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$96,400		\$0	\$0		\$92,800

In-Kind Contribution:	100% of Total ETP Funding Required	\$127,000
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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	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement Skills	72	8-200	0-30	\$900	\$14.90
				Weighted Avg: 60			
2	Retrainee Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement Skills	20	8-200	0-30	\$1,400	\$12.19
				Weighted Avg: 70			

Minimum Wage by County: Job 1: Alameda, Contra Costa, and Santa Clara: \$16.25/hr.; Los Angeles: \$16.04/hr.; Orange: \$15.98/hr.; San Diego: \$15.60/hr.; Sacramento: \$15.59/hr.; Monterey, Riverside, San Bernardino, and Santa Barbara Counties: \$14.90/hr.

Job 2: Alameda, Contra Costa, and Santa Clara: \$13.55/hr.; Los Angeles: \$13.37/hr.; Orange: \$13.32/hr.; San Diego: \$13.00/hr.; Sacramento: \$12.99/hr.; Monterey, Riverside, San Bernardino, and Santa Barbara Counties: \$12.19/hr.

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

Up to \$2.08 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation				
Occupation Titles	Wage Range		Estimated # of Trainees	
	Job 1	Job 2 (Job Creation)	Job 1	Job 2 (Job Creation)
Assistant Property Manager			11	3
Leasing Consultant			5	2
Maintenance Supervisor			27	6
Maintenance Technician			10	5
Property Manager			19	4

INTRODUCTION

Founded in 1999 and headquartered in Newport Beach, Trinity Property Consultants, LLC (Trinity) purchases commercial properties. Its sister company, Pacific Personnel Services, Inc. (PPS), manages the properties and provides services including on-site property management and maintenance, financial and accounting services, advanced IT solutions, human resources, marketing, due diligence, capital needs assessments, operational audits, renovation services, property repositioning and asset management services. Together, Trinity and PPS provide

property acquisition and management services for a diverse portfolio of acquired apartment complexes throughout the western US.

Both companies will participate in this proposal and both companies are eligible for standard retraining under the out-of-state competition provisions for servicing customers located inside and outside of California. Training will take place at Trinity's 32 apartment locations throughout California.

PROJECT DETAILS

To meet their business needs, Trinity and PPS must improve its sales and customer services by adding the most up-to-date technology (such as rental application, payment software, and social media services) and standardizing maintenance processes and procedures to improve customer service and lower costs. In addition the company expects to grow by 40% over the next 18 months. This growth will require hiring new employees to staff these new property acquisitions, and promoting current employees to take on new responsibilities that come with growth.

Training will provide Trinity's workforce with the skills it needs to teach staff how to work more effectively and efficiently as it creates a more cost-effective, streamlined environment. Class/Lab, E-Learning, and CBT training will cover new technology, processes, and systems associated with each job function while promoting an enhanced level of tenant experience.

Retrainee - Job Creation

In this proposal, Trinity has committed to hiring 20 new employees as shown in Job Number 2. To be eligible for reimbursement under this Job Number, the trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

Over the next 18 months, Trinity's onsite and corporate employees are expected to grow by 40%. The Company expects to buy 10 new apartment buildings in California within the next several months. Current employees will be promoted so they can handle the additional responsibilities of its new properties and will be replaced by new employees who will need to be trained quickly and efficiently.

Training Plan

Business Skills (15%): Training will be offered to Property Managers, Leasing Consultants and Maintenance Staff who will need to learn new business skills to handle all the changes being instituted over the next two years. Employees will develop more sophisticated skills in communication, conflict resolution, business fundamentals, product knowledge, sales strategies, time management, financial analysis and strategic planning so that their skills will match their new roles. Maintenance Staff will learn project management skills so they can effectively implement new job assignments related to the renovation projects. Leasing Consultants and Property Managers also need to learn techniques for Social media as it applies to sales and marketing. Property Managers require people skills with an emphasis on relational selling as keys to building long term relationships with our potential renters and our current clients.

Commercial Skills (20%): Training will be offered to Property Managers, Assistant Property Managers, Leasing Consultants, and Maintenance Supervisors who will need new skills to market and lease properties. Maintenance Supervisors and Maintenance Technicians need additional skills in repairing and using a wide range of HVAC, electrical, and plumbing systems and equipment.

Computer Skills (25%): Training will be offered to all occupations in the use of new software and hardware. New iPads, iPad applications, Property Solutions software program and Yardi maintenance software will affect every aspect of Trinity's operations.

Continuous Improvement (10%): Training will be offered to all occupations. Training is designed to improve processes. Training on new iPad applications and Property Solutions systems will provide opportunities to improve quality and accountability and reduce errors and completion times.

Commitment to Training

Trinity currently spends \$200,000 annually in training per California facility. Trinity represents that ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. As employees are promoted in the organization, they are trained in the mandatory, job specific skills required for their next position.

Trinity currently has 5 in-house trainers that conduct instructor-led training. Training will be administered from each location by internal staff. Additionally, Sierra Consulting will assist in project administration.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Trinity Property Consultants retained Sierra Consulting Services in Cameron Park to assist with development of this proposal for a flat fee of \$9,000.

ADMINISTRATIVE SERVICES

Trinity Property Consultants also retained Sierra Consulting Services to perform administrative services in connection with this proposal 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

- Interpersonal Communications
- Conflict Resolution
- Creative Marketing
- Customer Service
- Employee Coaching
- Employee Development
- Employee Motivation
- Business Communication
- Business Fundamentals
- Communication Styles
- Cost Control
- Financial Analysis
- Negotiating
- Planning and Organization
- Product Knowledge
- Project Management
- Relationship Building Through Sales & Service
- Sales Strategies
- Marketing Strategies
- Time Management
- Business Writing
- Leadership
- Strategic Planning
- Behavior Style Strategies
- Retaining Customers

COMMERCIAL SKILLS

- Effective Complaint Resolutions
- Good Tenant Relations
- Resident Retentions
- Work Order Processing
- Leasing Strategies and Techniques
- Application Processing
- Developing and Following Procedures
- Security Standards
- Social Media for Multifamily
- Rental Property Management
- Move-In Process for New Residents
- Installation of Non-Structural Features
- Efficient Equipment Repair
- Plumbing Systems
- HVAC Systems
- Building Systems

- Electrical Upgrades
- Material Handling

COMPUTER SKILLS

- Property Solutions (Rent Payment Software)
- Rent Café (Rent Application Software)
- Yardi (Maintenance Software)

CONTINUOUS IMPROVEMENT

- Quality Control
- Problem Solving
- Creating a Quality Organization
- Change Management
- Effective Decision Making
- Meeting Management
- Organizational Process Improvement
- Team Building

E-Learning 8–200

BUSINESS SKILLS

- Time Management
- Reputation Management
- Customer Service
- Office Administration
- Phone Skills

COMMERCIAL SKILLS

- Accounts Payable for Apartments
- Content Creation
- Deposit Accountings
- First of the Month Billing
- Leasing Specials
- Market Survey's – Weekly Updates
- Property Solution Check Scans
- Knowing your Competition
- Craigslist Posting
- Intro to Marketing Systems
- Outreach Marketing
- Relate 24/7 Training
- Twitter and Tweeting for Apartments
- Dashboard Training (1 & 2)
- Leasing Process – Applications
- Leasing Process – Voyager
- How to Close
- Intro to Property Solutions

CBT Hours

0-30

BUSINESS SKILLS

- Customer Relationship Management (2 Hr)
- Customer Service as a Competitive Advantage (3 Hr)
- Conflict Resolution (2 Hr)
- Advanced Telephone Techniques (2 Hr)
- Employee Coaching (1 Hr)
- Employer Motivation (1 Hr)
- Time Management (1 Hr)
- Dealing with Difficult People (1 Hr)
- Business Writing: Grammar Works (1 Hr)
- Introduction to Social Media (1 Hr)
- Traffic Generation (1 Hr)
- Essential Skills for the New Supervisor (2 Hr)
- Being a Team Player (1 Hr)
- Building Team Culture (1 Hr)

COMMERCIAL SKILLS

- Leasing Introduction (1 Hr)
- Leasing Telephone Techniques (1 Hr)
- Leasing: Responding to Email Inquiries (1 Hr)
- Leasing: Greeting and Qualifying (1 Hr)
- Leasing: Touring and Community (1 Hr)
- Leasing: Closing and Follow-up (1 Hr)
- Advanced Leasing (2 Hr)
- Internet Leasing (1 Hr)
- Creative Marketing Promotions (1 Hr)
- Preparing a Perfect Market Ready Apartment (2 Hr)
- Lockout Tagout (1 Hr)
- Preventative Maintenance (1 Hr)
- Property Management Financials (2 Hr)
- Resident Retention for Today's Savvy Customers (3 Hr)
- Curb Appeal (1 Hr)
- Leasing for a Living (3 Hr)
- Maintenance for Office Staff (1 Hr)
- Marketing Principles for Multifamily Housing (2 Hr)
- Leadership: Profiles in Multifamily Housing (1 Hr)

Hazardous Materials

- Blood-Borne Pathogens (1 Hr)
- Hazardous Communication (1 Hr)
- Mold Awareness (1 Hr)
- Lead Poisoning Awareness (1 Hr)
- Asbestos Awareness (1 Hr)

Note: Reimbursement for retraining is capped at 200 total hours per trainee, regardless of method of deliver. CBT is capped at 50% of total training hours per-trainee.