



Training Proposal for:

USA Properties Fund, Inc.

Agreement Number: ET16-0469

Panel Meeting of: May 26, 2016

ETP Regional Office: Sacramento

Analyst: M. Jones

PROJECT PROFILE

Contract Attributes:	Retrainee	Industry Sector(s):	Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Alameda, Contra Costa, Los Angeles, Orange, Placer, Riverside, Sacramento, San Bernardino, San Diego, Santa Clara, Sonoma, Ventura	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: 368	U.S.: 381	Worldwide: 381
<u>Turnover Rate:</u>	19%		
<u>Managers/Supervisors:</u> (% of total trainees)	14%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$173,190		\$0	\$0		\$173,190

In-Kind Contribution:	100% of Total ETP Funding Required	\$303,893
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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, Hazardous Materials, Management. Skills, Literacy Skills	42	8-200	1-29	\$495	\$19.00
				Weighted Avg: 33			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Hazardous Materials, Management. Skills, Literacy Skills	254	8-200	1-29	\$600	* \$15.60
				Weighted Avg: 40			

* It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Jobs 1 & 2: Alameda, Contra Costa, Santa Clara \$17.02; Los Angeles \$16.48; Orange \$16.51; San Diego \$16.46; Sacramento \$16.10; Placer, Riverside, San Bernardino, Sonoma and Ventura \$15.60

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 \$2.75 per hour may be used to meet the Post-Retention Wage for Job Number 2.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1 (USA Properties)		
Corporate Account Staff		13
Human Resource Staff		5
Administrative Staff		7
Manager II		11
IT Technician I		5
IT Technician II		1

JOB NUMBER 2 (USA Multifamily)		
Administrative Staff I		47
Administrative Staff II		59
Administrative Compliance		8
Leasing Agent		9
Porter		8
Manager I		10
Maintenance Technician I		52
Maintenance Technician II		61

INTRODUCTION

Founded in 1981 in Roseville, USA Properties Fund, Inc. (USA Properties) (www.usapropfund.com) is a real estate development organization that specializes in building, developing and managing family and senior communities. USA Properties provides management, maintenance and upkeep to more than 78 properties in California. The Company competes for these large-scale projects with similar development and management businesses located outside California.

USA Properties will hold the contract to train its own employees and those of its wholly owned subsidiary USA Multifamily Management, Inc. Training will be provided to the locations in Alameda, Contra Costa, Los Angeles, Orange, Placer, Riverside, Sacramento, San Bernardino, San Diego, Santa Clara, Sonoma and Ventura counties.

Need for Training

USA Properties is currently using an inefficient paper process prone to errors. USA Properties will be going “green,” transitioning to a paperless and more technologically advanced web-based process. One of the new web-based processes will use Samsung Android devices for real-time communication and documentation of company data inspections, purchase orders, and expense reports. The Company is also switching to another web-based system to convert petty cash to a commercial card expense reporting system. The new web-based technology allows residents to pay and submit work orders online. All staff requires training on the new web-based software programs to ensure the Company’s effective transition.

In addition, USA Properties plans to stop using outside vendors to complete property maintenance to reduce costs. The Company’s current Maintenance Technicians lack the necessary skills to complete certain maintenance tasks. USA Properties plans to advance the Maintenance Technicians skill set. Training will focus on HVAC repair, pool repair and maintenance, and some light construction work such as drywall repair and plumbing. Along with this training Maintenance Staff, Administrative Staff, and Managers will receive training on how to assess problems and effectively manage projects.

USA Properties projects a 20% time savings with the new web-based software and maintenance training in place. This will help reduce errors by adding more controls and increase efficiencies through streamlining.

PROJECT DETAILS

Training Plan

Classroom/Lab training will be provided at several property locations throughout California. In addition, USA Properties plans to provide Computer Based Training to focus on courses that are job specific.

Business Skills (60%): Training will be provided to all occupations specific to each trainee's job function. Training will include topics such as Conflict Resolution, Cost Control, Planning and Organization, and Work Order Processes.

Literacy Skills (5%): Training will be provided to Leasing Agent, Administrative Staff, Managers, and Maintenance Technicians to improve basic written communication skills and writing skills for business purposes. Training will include How to Write a Lease Violation, Variance Report, Resident Notes and Completed Work Order.

Commercial Skills (15%): Training will be provided to Porter and Maintenance Technicians. Training will include HVAC Repair, Repairing Drywall, and Work Order Processing.

Management Skills (Managers and Supervisors Only) (5%): Training will be provided to Managers to prepare them for enhanced managerial responsibilities and enable them to more effectively coach trainees. Training will include Communication Skills, Decision Making, Leadership and Team Building.

Computer Skills (10%): Training will be provided to all occupations to learn and become efficient with the new software program and use of tablets. Training will include Computer Networking, Financial Management System, OnSite Lead Management, and Project Management Software.

Hazardous Materials (5%): Training will be provided to Porter, Maintenance Technicians, Administrative Staff, and Managers to ensure safe use and disposal of chemicals and asbestos. Training topics will include Asbestos Removal, Hazardous Materials Handling, Hazardous Chemical Cleaning/Handling and Hazardous Waste Cleaning.

Computer-Based Training

CBT training is capped at 29 hours (50%) of total training hours per-trainee. CBT will be provided to supplement USA Properties's curriculum as a more convenient means of delivering basic training.

Commitment to Training

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. USA Properties reports an annual training budget of approximately \$261,211. Current and past trainings includes all state and federal mandated training, sexual harassment prevention, new employee orientation and various safety training. USA Properties uses Computer-Based Training courses that are tailored for job-specific skills.

➤ Training Infrastructure

USA Properties is prepared to begin training upon Panel approval. USA Properties has internal staff that will schedule the training and 2 in-house trainers to conduct Class/Lab training.

Impact/Outcome

Training will improve on communication efficiency between corporate staff and frontline workers, reducing paperwork, and decreasing the use of vendors by training in-house Maintenance Technicians.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

USA Properties retained Sierra Consulting Services in El Dorado Hills to assist with development of this proposal for a flat fee of \$15,000.

ADMINISTRATIVE SERVICES

Sierra Consulting Services will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Training will be conducted by in-house trainers and outside vendors to be identified later.

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

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Communication Skills
- Cost Control
- Dealing with Difficult People
- Dealing with Mentally Ill Residents
- Employee Coaching
- Essential Skills for the New Supervisor
- Financial Analysis
- How to Read a Budget
- How to Explain Budget Variances
- How to Plan Purchases
- How to Prepare Contracts
- How to Work with Vendors
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques
- Operational Skills
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Property and Resource Management Skills
- Retaining Customers
- Relationship Building
- Strategic Planning
- Successful Leasing/Sales Techniques
- Tax Credit Compliance
- Time Management
- Work Order Processes

COMMERCIAL SKILLS

- HVAC Repair
- Pool/Spa Maintenance
- Electrical Repair/Maintenance
- Mold Remediation Procedures
- How to Read Site Plans
- Kitchen and Bathroom Plumbing Systems
- Light Construction: Job Site Preparation

- Light Construction Methodology
- Light Construction Job Site Sequencing
- Light Construction Team Support
- Repairing Drywall
- Work Order Processing
- Vendor Management

COMPUTER SKILLS

- Advanced Microsoft Office
- Avid Purchasing Management Software
- Computer Networking
- Computer Programming
- Email Etiquette
- Email Inbox Management
- Financial Management System
- SQL Reports
- OnSite Lead Management
- OnSite Forms Generation
- Managing Online Payments from Residents
- Project Management Software
- Yardi Software Process/Procedures
- How to Use a Tablet
- Microsoft Sharepoint
- Software Applications and Equipment

HAZARDOUS MATERIALS

- Asbestos Removal
- Hazardous Materials Handling
- Hazardous Chemical Cleaning/Handling
- Hazardous Waste Cleaning

MANAGEMENT SKILLS (managers and supervisors only)

- Coaching Procedures
- Decision Making
- Effective Meetings for Leaders
- Leadership
- Motivation
- Supervisor Skills
- Teambuilding

LITERACY SKILLS

- How to Write a Lease Violation
- How to Write a Variance Report
- How to Write Resident Notices
- How to Write a Completed Work Order

Literacy Training cannot exceed 45% of total training hours per-trainee

E-Learning Hours

8-200

BUSINESS SKILLS

- Accounting
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Communication Skills
- Cost Control
- Dealing with Difficult People
- Dealing with Mentally Ill Residents
- Employee Coaching
- Essential Skills for the New Supervisor
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- Coaching Procedures
- Decision Making
- Effective Meetings for Leaders
- Leadership
- Motivation
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LITERACY SKILLS

- How to Write a Lease Violation
- How to Write a Variance Report
- How to Write Resident Notices
- How to Write a Completed Work Order

CBT Hours

1-29

BUSINESS SKILLS

- Leasing Recharge: Telephone Skills (.5 hrs)
- Leasing Recharge: How to Tour (.5 hrs)
- Leasing Recharge: ABC's of Closing (.5 hrs)

- Leasing Recharge: Responding to Email Inquiries (1 hr)
- How to Communicate Assertively (1 hr)
- How to Delegate Effectively (1 hr)
- Handling Difficult Residents (1 hr)
- Effective Meetings (1 hr)
- Time Management for Property Management (.5 hrs)
- How to Make Suggestions Effectively (.5 hrs)
- How to Investigate an Incident (1 hr)
- Housing Quality Standards (1.5 hrs)
- How to Make Suggestions Effectively (.5 hrs)
- How to Investigate an Incident (1 hr)
- Housing Quality Standards (1.5 hrs)

COMMERCIAL SKILLS

- Tax Credit Compliance 1 (1 hr)
- Tax Credit Compliance 2 (1 hr)
- Tax Credit- Special Programs (1 hr)
- Tax Credit- Mixed-Income Buildings (1 hr)
- Tax Credit- Under-Age Applicants (.5 hrs)

COMPUTER SKILLS

- Yardi Accounting- Subsidy Refresher (1 hr)
- Microsoft Excel (3 hrs)
- Microsoft Outlook (1 hr)
- Microsoft Outlook Calendar Management (.5 hrs)
- Using Mimecast as an Email Archive (.5 hrs)
- USA Banking Procedures (.5 hrs)
- Yardi Accounting 101A- Basic Concepts (.5 hrs)
- Yardi Accounting 101B- The Aged Receivables Report (.5 hrs)
- Yardi Accounting 101- Quiz (.5 hrs)
- Yardi Accounting 201A- Intro to Subsidy Accounting (.5 hrs)
- Yardi Accounting 201B- Subsidy Payments (.5 hrs)
- Yardi Accounting 201C- Adjustment Charges (1 hr)
- Yardi Accounting 201- Quiz (.5 hrs)
- Yardi Accounting- Fixing Errors (.5 hrs)

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