

ATTACHMENT C

KIT PROJECT SUMMARY SHEET

A NON-REFUNDABLE, \$500 APPLICATION FEE is due at time of submission.

COMPANY INFORMATION

Application Date: July 1, 2019

Provide the legal name of the company you wish to be named on the KIT Agreement and other data as requested.

Company Name: ABC Company, Inc.

Mailing Address: <u>P.O. Box 1234</u>	Project Address: <u>5678 East Highway</u> <small>(if different)</small>
City: <u>San Marcos</u>	City: <u>Topeka</u>
State: <u>TX</u> Zip: <u>78901-1234</u>	State: <u>KS</u> Zip: <u>66612</u>

Company Contact Person: Maggie L. Smith Title: Director of Admin/Human Resources

Phone: 785-555-1212 Ext. 111 E-mail: msmith@abccoinc.com

Federal Employer Identification Number (FEIN): 12-3456789 NAICS Code: 524210

Using the provided link, please indicate the company's product or service on the line below. The description must define the NAICS Code provided above.

[Bureau of Labor Statistics](#) Insurance Agencies and Brokerages

Will this application be used for the HPIP Program? Yes No

Will the Company make application to the PEAK Program? Yes No

Does more than 51% of revenue come from out of state markets? Yes No

Average employment level for the preceding 12 month period:	Project Facility in Kansas	Total in Kansas
<u>115</u>	<u>115</u>	<u>115</u>

TRAINING INFORMATION

Total number of new positions to be trained: 17 Average wage of the new positions: \$ 25.11 per hour

Month and year training contract will begin: July 2019

Month and year training contract will end: June 2020

SECONDARY PROJECT CONTACT

Name: John Smith Phone: 785-555-3333

Company Sunflower Consulting Agency e-mail: John.smith@sunflowerconsult.com

KANSAS DEPARTMENT OF COMMERCE STAFF USE ONLY:

Staff Initials: _____	Commitment: _____
Project Number: _____	Amount of Award: \$ _____
	Company Match: \$ _____

Kansas Industrial Training (KIT) Application

Kansas Department of Commerce

I. BRIEF DESCRIPTION OF THE COMPANY'S BUSINESS OPERATION

A. Brief history of the company:

- 1) Please provide a brief history of the company and the factors leading to the decision to locate or expand in Kansas. In this summary, please include information regarding the project facility or facilities, the company's product or service, the market area and the need to create additional positions. Please limit your response to a few paragraphs.

Jim Jones began the Company in 2000 in Topeka, KS as a general insurance agency. Historically, the Company's main business segment was insurance for the carnival industry. In February 2007, Calvin Hobbes, ascended to the role of president and CEO and has lead the organization into the next generation. In 2008 he developed new insurance programs for waterparks and amateur sports. Mr. Hobbes began investing in people and technology in a way that ABC Company Insurance had not experienced in the past. In October 2012, ABC Company Insurance was purchased by Insurance Agencies and Brokerages, Inc. (IAB) from San Marcos, TX. ABC Company is a subsidiary of IAB.

ABC Company is expanding through the growth of its historical lines of business as well as the new lines of business. It is also contemplating the acquisition of a new contract located outside the state of Kansas. In the event the acquisition is completed, that line of business and the addition of jobs will be run out of the regional headquarters located in Topeka, Kansas. The combination of these exciting events requires ABC Company to remodel its existing facility to handle this future growth.

- 2) Calculate the average employment level for the preceding 12-month period (if applicable). To verify your employment count throughout the life of the grant, we will use mid-month numbers provided to the Kansas Department Labor on the K-CNS 100 report. Please be sure to use these numbers in the table below.

NOTE: Double click on table to open spreadsheet.

	Year	Month	Total Employees in KS Project Facility	Total Employees in Kansas
1	2018	July	100	100
2	2018	August	115	115
3	2018	September	115	115
4	2018	October	116	116
5	2018	November	116	116
6	2018	December	115	115
7	2019	January	114	114
8	2019	February	115	115
9	2019	March	115	115
10	2019	April	117	117
11	2019	May	118	118
12	2019	June	119	119
Total			1375	1375
12-Month Average			115	115

- 3) When will you begin to hire the positions listed in this application?
July 2019

- B. Health Care Plan Coverage must be made available to all full-time employees within 180 days of employment. Please mark each shaded box to indicate that your company provides these required coverages:

X	Hospital Care	X	Physician Care	X	Prescription Drug
X	Substance Abuse Treatment	X	Prenatal and Post-Natal Care	X	Mental Health Care

II. DESCRIPTION OF THE TRAINING PROJECT

- A. Please provide a summary of how the company plans to implement the proposed training project.

All new hires will go through company processes and procedures in orientation training, led by the department managers. This training is standardized and was developed by ABC Company based upon their corporate values, mission, and industry. In addition, the new employees will receive extensive training on the Agency Management System, a series of internal systems necessary to perform their jobs.

Additionally, the salespeople (producers) must be appropriately licensed to sell ABC Company's insurance products and services. Therefore, they must complete insurance carrier training to learn the products and services. Producers will be sent to insurance carrier training which will be conducted by the insurance carriers.

These funds will be used to train new employees that will increase the total headcount of the Company. The training outlined herein is a requirement for the new employees to be effective and efficient in the performance of their jobs.

SAMPLE

III. BUDGET DETAIL OF THE TRAINING PROJECT

- A. Please provide the Course Title and a General Course Description of the training courses, type of training, the source of instructor, the number of positions to be trained, the number of hours for each training course, and associated costs. **When calculating the cost of the training line item, please remember when the employee is a student; do not include their base hourly rate. If the employee is a teacher, you may include their base hourly rate.**

Course Title	General Course Description	Classroom, OJT or Self Directed	Source of Instructor In-house or Vendor's name	Total Positions to be Trained	Hours of Training per Position	Hours of training x number of sessions x base hourly rate -or- Cost of Course	Cost
Example: New Employee Orientation	Topics covered will include employee benefits, company orientation, policy review, and information on the various departments within the company.	Classroom	In-house	2	8	8 hrs x 2 sessions x \$20/hr	\$320
Agency Management System Training	Employees are trained on the daily processes involved in electronic filing, contact/client management, and desktop faxing, as well as navigation and usage training for the Agency Management System.	Classroom	In-house	17	24	24 hrs x 17 sessions x \$29.48/hr	\$12,027.84
Insurance Carrier Training	New Producers (sales people) are sent to insurance carrier training to learn general insurance knowledge and about the specific insurance carrier's products and services.	Classroom	Vendor – The Hartford	8	80	8 classes x \$500/class	\$4,000.00
New Hire Orientation	Employees are trained on the computer systems as well as provided copies of the employee manual. Employees are assisted with completing tax and insurance forms.	Classroom	In-house	17	8	8 hrs x 17 sessions x \$21.60/hr	\$2,937.60
						Total:	\$17,465.44

B. List costs relevant to customizing and/or developing the training courses listed in Table A. Course titles must match Section A.

Course Title	Hours to develop x hourly rate	Cost
Example: New Employee Orientation	40 hrs x \$20/hr	\$800
Agency Management System Training	60 hrs x \$25.00/hr	\$1,500.00
New Hire Orientation	45 hrs x \$22.50/hr	\$1,012.50
	Total:	\$2,512.50

C. Materials and Supplies (*such as Notebooks, Manuals, Textbooks*)

\$200.00

D. Training Aids (*such as White Boards, DVD's*)

\$400.00

E. Minor Training Equipment (*such as Computers, Projectors*)

\$1,400.00

F. **Total Cost of Training Project (Items A-E)**

\$23,477.94