



**Panel Amendment #1 Proposal for:
Moore Benefits, Inc.
Agreement Number: ET15-0209**

Amendment Effective Date: June 10, 2015

Panel Meeting of: July 24, 2015

ETP Regional Office: San Diego

Analyst: M. Ray

CURRENT PROJECT PROFILE

Contract Type: SET Frontline - Retrainee

Industry Sector(s): Financial Services Services

Counties Served: Orange

Repeat Contractor: Yes No

Union(s): Yes No

Priority Industry: Yes No

Current Contract Term: August 4, 2014 to August 3, 2015

Substantial Contribution: Yes No

CURRENT FUNDING

Current Funding
\$3,520

AMENDMENT FUNDING

Requested Funding	Total Funding
\$3,344	\$6,864

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	SET Frontline Retrainee	Business Skills, Commercial Skills, Computer Skills	4	8-120	0	\$1,716	\$27.09
				Weighted Avg: 78			

Minimum Wage by County: SET Statewide Average is \$27.09 per hour.

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

Up to \$1.09 per hour may be used to meet the SET Statewide Average Hourly Wage.

Wage Range by Occupation	
Occupation Title	Wage Range
Account Manager	
Sales Representative	
Customer Service Associate	
Owner	

INTRODUCTION

Founded in 2001, Moore Benefits, Inc. (Moore) (www.moorebenefits.com) is a full-service employee benefits consulting company that provides brokerage, administration, education, and advocacy services for small to mid-sized businesses. A small business located in Irvine, the Company delivers customized employee benefit plans that aligns with the unique needs of its customers and maximize return-on-investment.

AMENDMENT DETAILS

In order to stay current with new regulatory legislation such as the Affordable Care Act (ACA), Moore must continue to provide training in Regulation Updates, Product Knowledge, and various software systems used in the healthcare industry. To date, the Company has delivered enough training hours to exhaust its current ETP funding.

Moore requests to increase the following:

- 1) Weighted average hours per trainee from 40 to 78
- 2) Maximum hours per trainee from 60 to 120
- 3) Agreement term from 12 to 24 months

The additional training is already listed under the Curriculum. As such, there will be no changes to the Curriculum.

The Amendment will be effective 06/10/2015, the date the revision request was submitted. Training to be reimbursed by the additional funding was not expected to begin until the effective date. However, the additional funding is for existing trainees (increased weighted average training hours). As such, this is not a Phase II Amendment.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by Moore under the current ETP Agreement(s):

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET15-0209	\$6,864	8/4/14 – 8/3/15	3	0	0

To date, 160 eligible training hours has been tracked which equates to 100% of the current Agreement amount.