



**Training Proposal for:
United Agencies Burbank Insurance Services, LLC**

Small Business \leq \$50,000

ET15-0217

Panel Meeting of: July 25, 2014

ETP Regional Office: North Hollywood **Analyst:** L. Vuong

CONTRACTOR

- Type of Industry: Insurance Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 35
Worldwide: 35
Number to be trained: 33
Owner Yes No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 12%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$27,588
- In-Kind Contribution: \$47,800

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 SB <100	Business Skills, Computer Skills, Continuous Impr.	33	8-60	0	\$836	\$16.04
				Weighted Avg: 38			

- Reimbursement Rate: \$22 SB Non-Priority
- County(ies): Los Angeles
- Occupations to be Trained: Commercial Account Agent, Account Agent, Administrative Staff, Owner
- Union Representation: Yes
 No
- Health Benefits: \$3.00 per hour

SUBCONTRACTORS

- Development Services: Training Refund Group (TRG) in Irvine, assisted with development for a flat fee of \$1,000.
- Administrative Services: TRG will also provide administrative services for the amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

United Agencies Burbank Insurance Services, LLC (United Agencies) is a small privately owned business that began operating in 1953. United Agencies provides automobile, home, workers compensation and health insurance coverage for individuals and businesses. Currently, United Agencies serves 5,500 clients in Southern California with two locations in Burbank and Mission Hills.

Training will be for employees at both locations.

The Company reports that the health insurance industry is rapidly changing due to the Affordable Care Act. As such, United Agencies must upgrade its software system to comply with new insurance plans, quoting systems and healthcare regulations. In addition, the Company is striving to meet customer demand, expand business, keep up with technological changes and remain competitive in the insurance industry.

Training Plan

The Company is implementing a new software system and operational processes and training is needed for all workers. ETP funds will help the Company deliver formalized training to its workforce for the first time. The proposed training will assist to upgrade worker job skills to become proficient, competent, increase service, comply with insurance requirements and support the Company's growth. United Agencies anticipates the proposed training to begin during the first week of August 2014. Classroom/Lab and Videoconference training will be delivered to all occupation as follows:

Business Skills - Training will focus on industry requirements so staff can provide innovative resolutions, develop strong and competitive sales techniques, and support the Company as it continues to grow and compete.

Computer Skills - Training will help trainees utilize the Company's automated system to provide efficient and effective customer service. Trainees will also learn new insurance plan and accounting to support customers and manage overall business operations.

Continuous Improvement - Training will promote company-wide teamwork, improve internal relations, time management, improve efficiency and to become more productive as a whole organization.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Accounts
- Customer Service
- Sales Skills
- Quoting System Enhancements
- General Accounting
- X-Mod Factors (insurance rating)
- Reporting

COMPUTER SKILLS

- Microsoft Applications
- Adobe Acrobat
- Epic Agency Management

CONTINUOUS IMPROVEMENT

- Account Processing
- Account Management
- Teambuilding

Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.