STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Montecito Financial Services

Agreement Type: Small Business

Agreement Number: ET09-0438

Panel Meeting of: **January 23, 2009**

ETP Regional Office: **North Hollywood** Analyst: M. Tolentino

CONTRACTOR:

- Type of Industry: Services
  Priority Industry: ☐ Yes ☒ No
- Contractor's # of Full-Time Employees
  - *California:* 19
  - *Worldwide:* 19
  - *Number to be trained:* 15
- Turnover Rate: 7%
- Repeat Contractor: ☐ Yes ☒ No

CONTRACT:

- Training Project Profile: SET/Retrainee
- ETP Funding Amount: $11,220
- In Kind Contribution: $12,360
- Average Cost per Trainee: $748
- Post Retention Wage: $23.64
- Health Benefits: N/A
- Occupations to be Trained: Owner, Manager, Tax Accountant
- Training Menu:
  ☒ Business skills ☐ Literacy skills
  ☐ Commercial skills ☐ Management skills
  ☐ Computer skills ☐ Manufacturing skills
  ☐ Cont. Improvement ☐ Other:
- Range of Hours: 8-61 Weighted Average: 34

- Multiple Job Numbers: ☐ Yes ☒ No
- County(ies) Served: Los Angeles
- Union Representation: ☐ Yes ☒ No
- Subcontractor: Sterling Management Systems of Glendale will provide Business skills at a cost to be determined.
- Third Party Services: N/A

INTRODUCTION

Founded in 1971, Montecito Financial Services, which does business as Robert Hall & Associates, is a family-owned tax consulting firm providing tax planning and tax return preparation for individuals and corporations. The company qualifies for ETP funding under the Special Employment Training provisions outlined under Title 22, California Code of Regulations, Section 4409(a) for training frontline workers who earn at least the state average hourly wage. Company representatives state that training will improve the skills of its employees, providing better customer service to clients and retaining business in California.

RECOMMENDATION

For the reasons set forth above, staff recommends approval of this proposal.