



# MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT WORKFORCE DEVELOPMENT BOARD (WDB)

ERIK CUSHMAN, WDB CHAIR

## Monterey County Workforce Development Board (WDB)

Marina Library, 190 Seaside Circle, Marina, CA

**Wednesday, August 5, 2015, 8:00 am**

**WDB Members:**

**Erik Cushman,**  
*WDB & Executive Chair*

**Anthony Aniello**  
*WDB 1st Vice Chair*

**Mary Ann Leffel**  
*WDB 2nd Vice Chair*

- Aaron Oskolkoff
- Al Davis
- Andy Hartmann
- Brian Turlington
- Cesar Lara
- Dave Potter
- Diana Carrillo
- Elliott Robinson
- Harbhajan "Harvey" Dadwal
- Hunter Harvath
- Jay Donato
- Karen Wong
- Ken Peacock
- Kimberly Schnader
- Larry Silva
- Mimi Laurent
- Neal Heckman
- Paul Farmer
- Paula Calvetti
- Salvador Muñoz
- Sherry Farson
- Steve MacArthur
- Teresa Sullivan
- Dr. Walter Tribley
- Wendy Brickman
- Dr. Willard Clark Lewallen
- Yuko Duckworth

**Monterey County  
Workforce Development  
Board (WDB)**

**Joyce Aldrich,**  
*WDB Executive Director*

730 La Guardia Street, 2<sup>nd</sup> Fl  
Salinas, CA 93905  
(831) 759-6644  
[www.montereycountywdb.org](http://www.montereycountywdb.org)

### AGENDA

<b>CALL TO ORDER/INTRODUCTIONS:</b>	Erik Cushman, <i>Chair</i>
<b>CHANGES TO AGENDA:</b>	
<b>PUBLIC COMMENT/TESTIMONIAL:</b>	
<b>CONSENT CALENDAR:</b>	Erik Cushman
1. <b>ACTION:</b> Approve minutes from June 3, 2015.	
2. <b>ACTION:</b> Concur with the July 15, 2015 Executive Committee action to approve an Internal Memorandum of Understanding between Economic Development Department and Workforce Development Board for Business Services/On-the-Job Training implementation for Fiscal Year 2015-16.	
3. <b>ACTION:</b> Concur with the July 15, 2015 Executive Committee action to approve the recommendations regarding the State Employment Development Department Draft Directives open for comment including: Workforce Services Draft Directive (WSDD)-117 – Workforce Innovation and Opportunity Act (WIOA) Youth Program Requirements; WSDD-118 Local Board Recertification; and WSDD-119 WIOA Adult Program Priority of Service.	
4. <b>ACTION:</b> Concur with the July 27, 2015 Youth Committee action to accept Program Year 2014-15 close out program reports on Workforce Investment Act (WIA) Youth formula funds, Youth Employment Leadership, Silver Star, and Workforce Accelerator Fund 1.0.	
5. <b>ACTION:</b> Approve proposed new Eligible Training Provider List Master Agreement with Hartnell College.	
<b>DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS:</b>	Erik Cushman
1. <b>ACTION:</b> Review and approve the Local Workforce Investment Area (LWIA) closeout budget for PY 2014-15.	Ruben Trujillo
2. <b>ACTION:</b> Review and consider approval of recommended contract for Community Asset Mapping & Environmental Scan services selected through Request for Quotes #2015-01.	Joyce Aldrich
3. <b>UPDATE:</b> Review and discuss change in county policy for Board Member travel reimbursements.	Joyce Aldrich
4. <b>ACTION:</b> Review and approve Workforce Development Board's 2013-17 strategic initiatives and Local Plan Goals for PY 2015-16 in specified format.	Joyce Aldrich
5. <b>DIRECTORS REPORT:</b> Update on grant applications: Department of Labor Pre-release and Workforce Accelerator Fund 2.0. Verbal report out on California Workforce Association (CWA) Executive Committee Retreat.	Joyce Aldrich
6. <b>CHAIR UPDATE:</b> Meeting of the Minds Conference, Monterey September 8 through 10 <sup>th</sup> at the Marriott in Monterey	
<b>ANNOUNCEMENTS:</b>	Erik Cushman



## MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT WORKFORCE DEVELOPMENT BOARD (WDB)

### WDB Members:

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*WDB & Executive Chair*

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Dr. Walter Tribbley  
Wendy Brickman  
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ERIK CUSHMAN, WDB CHAIR

### SUBCOMMITTEE MEETINGS:

Business Services: 08/11/2015, Marina Library  
Executive: 08/19/2015 – Marina Library  
Oversight: 09/10/2015 – Marina Library  
Youth: 09/28/2015 – Marina Library

### WDB MEETING:

10/7/2015 – TBD

### ADJOURNMENT:

Erik Cushman

To request information, please contact the Monterey County Workforce Development Board (WDB) staff at (831) 796-6434 or visit our website at [www.montereycountywdb.org](http://www.montereycountywdb.org).

ALTERNATE AGENDA FORMATS: If requested, the agenda shall be made available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 USC Sec. 12132), and the federal rules and regulations adopted in implementation thereof. Individuals with a disability requiring a modification or accommodation, including auxiliary aids or services, in order to participate in the public meeting may make these requests to the Secretary to the WDB at (831)796-6434.

**UNADOPTED**

**Monterey County Workforce Investment Board**  
Marina Library, 190 Seaside Circle, Marina, CA  
**Wednesday, June 3, 2015**

**Members Present:** Erik Cushman (Chair), Diana Carrillo, Harvey Dadwal, Al Davis, Hunter Harvath, Cesar Lara, Mary Ann Leffel, Elliott Robinson, Kimberly Schnader and Brian Turlington, Larry Silva, Teresa Sullivan, Wendy Brickman, Paul Farmer, Sherry Farson, Steve MacArthur, Dr. Willard Lewallen, Yuko Duckworth, Mimi Laurent

**Members Absent:** Anthony Aniello, Paula Calvetti, Jay Donato, Andy Hartmann, Neal Heckman, Salvador Muñoz, Aaron Oskolkoff, Ken Peacock, Dave Potter and Dr. Walter Tribley

**Staff Present:** Joyce Aldrich, Marleen Bush, Flor Galvan and Ruben Trujillo

**Others Present:** Jerry Hernandez, Wil Moore, Barry Pasquarosa, Jacqueline Simmons and Dave Spaur

**Call to Order/Introductions:** Mr. Cushman called the meeting to order at 7:55 a.m. and asked for introductions. A quorum was established.

**Changes to Agenda:** Mrs. Aldrich requested that Business Item #4 be moved up before Business item #1.

**Motion:** Mr. Turlington motioned to approve the change to the Agenda.

**Second:** Ms. Brickman

**Approved unanimously by those in attendance**

**Public Comment:** Ms. Simmons introduced herself and spoke about the program she oversees called the Transitions for Recovery and Re-Entry Program, Inc.

**Consent Calendar:**

1. **Action: Approve minutes from February 4, 2015.**
2. **Action: Concur with the May 20, 2015 Executive Committee action to approve the revised WIB Policy**
3. **Action: Concur with the May 20, 2015 Executive Committee recommendation to consider the Memorandum of Understanding between Monterey County America's Job Center of California and Transitions for Recovery and Re-Entry Program, Inc. If approved, staff will forward to County Counsel for review/approval prior to being placed on the Board of Supervisors' agenda for final approval.**
4. **Action: Concur with the May 20, 2015 Executive Committee recommendation to consider the Inter-County Memorandum of Understanding between Monterey County Health Department, Public Health Bureau and Monterey County Economic Development Department for the Youth Empowerment Solutions (YES) Program for Peaceful Communities. If approved, staff will forward to County Counsel for review/approval prior to being placed on the Board of Supervisors' agenda for final approval.**
5. **Action: Concur with the May 20, 2015 Executive Committee recommendation to approve the proposed WIB budget for PY 2015-16.**
6. **Action: Concur with the May 20, 2015 Executive Committee recommendation to approve the changes to the status of the WIA Title I Youth subcontract with Turning Point for PY 2015-16, as required by the new Workforce Innovation and Opportunity Act (WIOA).**
7. **Action: Concur with the May 20, 2015 Executive Committee recommendation to approve application submittal of the Workforce Accelerator Fund 2.0 grant.**
8. **Action: concur with the May 20, 2015 Oversight Committee recommendation to approve the FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report for Program Year 2014-15 for Shoreline Workforce Development Services.**
9. **Action: Concur with the May 21, 2015 Oversight Committee recommendation to approve the Workforce Investment Act (WIA) Fiscal and Procurement Review Final Monitoring Report from the State Compliance Review Office for Program Year 2014-15.**
10. **Action: Concur with the May 21, 2015 Oversight Committee recommendation to approve the Workforce Investment Act (WIA) Program Final Monitoring Report from the State Compliance Review Office for Program Year 2014-15.**

**Motion:** Mr. Turlington motioned to approve the Consent Calendar

**Second:** Mr. Lara

**Approved unanimously by those in attendance**

**Discussion or Review of Business Calendar Action Items:**

4. **Action: Review and consider next steps with WIA Title I Adult Program RFP, previously subcontracted with Goodwill Industries DBA Shoreline Workforce Development Services (now Goodwill Central Coast).** Mrs. Aldrich reported that Goodwill Central Coast (formerly Shoreline) has experienced internal infrastructure changes which have reestablished them in a different manner. Goodwill Central Coast's original subcontract currently states they will expend a minimum of 25% of their contract funds on training services per Senate Bill (SB) 734. However, this year they are proposing to serve less and allocate more of the contract funds towards staff salaries rather than training. Given the Workforce Innovation and Opportunity Act strongly encourages local WDB's to increase the number of 'earn and learn' opportunities for participants, the members agreed that the local workforce system should be increasing the number of on-the-job training (OJT) contracts versus decreasing them. Therefore, the members expressed that they are not interested in renewing Goodwill's contract based on the new proposed budget and enrollment goal. Goodwill Central Coast is a strong supporter of the workforce system and has been an excellent partner for many years. Although they are going through internal changes at this time, they would like to leave the door open to respond to future requests for proposals. Ms. Aldrich reiterated the recommended options to the Board for consideration.

**Motion:** Ms. Leffel motioned to approve option #3 and submit a memorandum of understanding between the Office for Employment Training and WDB/Economic Development Department to engage in a minimum of 30 OJT's in the next fiscal year.

**Second:** Mr. Hunter

**Approved unanimously by those in attendance**

1. **Action: Consider and approve submission of a request to transfer \$389,436.50 in WIA Title I formula funds from Dislocated Worker to Adult Programs for fiscal year 2014-15 to the State Employment Development Department for approval.** Mrs. Aldrich reported that although staff publicized the Dislocated Worker Program, Monterey County has seen a low turnout of Dislocated Workers seeking enrollment for intensive or training services. She reported that the Adult allocation continues to move forward with participants enrolled into training. She is requesting to transfer an additional 25 percent of Dislocated Worker round 2 funds into the Adult allocation as Monterey County has not met the 80 percent expenditure/obligation requirement in order for Monterey County to carry over 20 percent of the first year's allocation. Mrs. Aldrich amended the staff report concerning the Table 2 Funding. The amount to be transferred should read \$389,437; with the total Dislocated Worker funds available at \$1,296,024; and Adult funds available at \$1,935,242.

**Motion:** Ms. Leffel motioned to approve the action with the amended budget.

**Second:** Mr. Lara

**Approved unanimously by those in attendance**

2. **Action: Review and consider amendment to the Bylaws to incorporate Workforce Innovation and Opportunity Act (WIOA) language and forward to the Board of Supervisors for final approval.**

**Motion:** Mr. Silva motioned to approve the action as stated.

**Second:** Ms. Leffel

**Approved unanimously by those in attendance**

3. **Action: Review and approve proposed new Eligible Training Provider List Master Agreement with Marinello Schools of Beauty for County Counsel review and Board of Supervisors' approval.** Mrs. Aldrich reported that in accordance with the Eligible Training Provider List Policy and Procedures it is required that staff bring the Master Agreements to the Board for approval prior to inputting them into the CalJobs system. She also reported that once the WIB becomes WDB, staff will be bringing all Master Agreements to the full WDB for approval.

**Motion:** Ms. Leffel motioned to approve the action as stated.

**Second:** Ms. Brickman

**Approved unanimously by those in attendance**

5. **WIB Retreat Debrief: Present outcomes from WIB Retreat and Next Steps.** Mr. Cushman reported that there are four key areas that came out of the WIB Retreat and the new WIOA law requires that the Board put all of their emphasis into the priority industries that are hiring. He reported that the requirements include working closely with community colleges and focusing on regional strategies. He also emphasized the importance of placing job seekers into work and the requirement to expend 75 percent of WIOA youth funds towards out-of-school youth. Mrs. Aldrich reported that the Youth Council is interested in hosting a Youth Summit this year.
  
6. **Renewal and appointment of all current WIB members to Workforce Development Board (WDB) and forward to the Board of Supervisors for final approval.** Mr. Cushman reported that the new composition requirements for the number of required members on the Board will change under WIOA. Mr. Cushman stated that the benefit of being on the Board is that members can be involved in developing workforce policy and strategies that support business and industry. He asked that the members bring forward employers who need support filling positions and potential employees who need assistance. Mrs. Aldrich reported that the Board composition transition takes place as of July 1, 2015 and current Board member terms will continue.

**Announcements:** Mr. Turlington announced that the Monterey County Business Council is hosting a Third Annual Monterey Bay Regional Critical Conversation on Thursday, June 18, 2015 from 9:30 a.m. to 2:00 p.m. at Casa Munras in Monterey. Mr. Lara reported that the State Assembly Select Committee will be hosting Pathways to Equitable Opportunities and Outcomes for Boys and Men of Color on June 26, 2015 from 2:00 p.m. to 5:00 p.m. at the Hartnell College Western Stage.

**Adjournment:** Mr. Cushman adjourned the meeting at 9:18 a.m.

**Motion:** Mr. Turlington motioned to adjourn the meeting as requested.

**Second:** Ms. Leffel

**Approved unanimously by those in attendance**

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# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR

**SUBJECT:** CONCUR WITH THE JULY 15, 2015 EXECUTIVE COMMITTEE ACTION TO APPROVE AN INTERNAL MEMORANDUM OF UNDERSTANDING BETWEEN ECONOMIC DEVELOPMENT DEPARTMENT AND WORKFORCE DEVELOPMENT BOARD FOR BUSINESS SERVICES/ON-THE-JOB TRAINING IMPLEMENTATION FOR FISCAL YEAR 2015-16

**DATE:** AUGUST 5, 2015

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board (WDB) concur with the July 15, 2015 Executive Committee action to approve an internal Memorandum of Understanding between Economic Development Department and WDB for Business Services/On-the-Job Training (OJT) implementation for Fiscal Year 2015-16.

**BACKGROUND:**

A division of the Monterey County Economic Development Department, the Monterey County WDB is charged with overseeing the allocation of WIOA funds and the WIOA funded program operations of the America's Job Center of California (Job Center) delivery system in Monterey County.

In 2015-16, the Monterey County WDB received \$1,483,814 in WIOA adult formula funds to provide services to WIOA eligible adults through its Job Centers. Of this amount, \$175,000 was previously obligated for a WIOA adult subcontract. On June 24, 2014, the Monterey County WDB elected not to extend the adult subcontract for PY 2015-16 and requested that the funds be returned to the WIOA adult formula allocation to be used for the development of OJT contracts provided within the structure of the Monterey County WDB's Business Services Team (BST) in partnership with the Office for Employment Training (OET).

The BST offers a full range of coordinated services to employers that can save businesses time and money. Services range from recruitment, to receiving human resource guidance on a variety of resources and benefits, as well as coordinating OJT contracts with employers that can help jobseekers engage in productive work, while also upgrading their skills on the job.

OET is a division of the Monterey County Economic Development Department. OET is the primary WIOA adult program provider in Monterey County and manages the career services component of the Job Center delivery system in partnership with CalWORKs Employment Services (CWES) and the Wagner-Peyser Employment Services. For adults needing more intensive support, OET provides eligibility, assessment, employment and training services, supportive services, case management and follow-up services.

**DISCUSSION:**

BST in partnership with OET will provide services under this agreement and manage the program and service delivery to the target customer population. OJT eligible customers are defined as adults who are 18 years and older, with a priority of service given to recipients of public assistance, other low-income individuals, individuals who are basic skills deficient, or veterans and eligible spouses.

WIOA adult formula funding available for the project term of August 1, 2015 to June 30, 2016 is not to exceed \$175,000. Through this agreement WDB will support the reimbursement of thirty (30) OJT contracts to employers for services rendered. This will augment OET's re-employment and training services.

An OJT may be provided under contract with an employer in the public, private non-profit, or private sectors for reimbursement to the employer for a portion of the wage rate of the participant for the extraordinary costs of providing training and supervision related to the training. Under this agreement, the reimbursement level will be fifty (50) percent of the wage rate.

**ATTACHMENTS:**

- Interdepartmental MOU – DRAFT
- Exhibit A – Scope of Services, Enrollment and Performance Goals – DRAFT
- Exhibit B – Budget – DRAFT
- Exhibit C – WIOA – General Conditions, Assurances and Certifications – *On file at WDB Office*

**ON-THE-JOB TRAINING PROGRAM  
TO PROVIDE SERVICES TO  
WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)  
ELIGIBLE ADULTS**

**INTER-DEPARTMENTAL  
AGREEMENT**

**August 1, 2015 through June 30, 2016**

**Between**

**Monterey County Workforce Development Board (WDB)  
Business Services Team (BST)**

**and**

**Monterey County Office for Employment Training (OET)**

**DRAFT**



## AGREEMENT

### I. DECLARATION

This agreement is entered into by and between the **MONTEREY COUNTY WORKFORCE DEVELOPMENT BOARD, (hereinafter referred to as WDB), BUSINESS SERVICES TEAM (hereinafter referred to as BST)** and the **MONTEREY COUNTY OFFICE FOR EMPLOYMENT TRAINING (hereinafter referred to as OET).**

For Program Year 2015-16 (starting August 1, 2015 to June 30, 2016), Monterey County WDB set aside a portion of its Workforce Innovation and Opportunity Act (WIOA) Adult formula funds to expand its On-the-Job Training (OJT) Program to serve up to thirty (30) individuals due to a recommendation not to extend its adult subcontract for PY 2015-16.

The purpose of this agreement is to formalize the working relationship and establish the roles and responsibilities of the WDB's Business Services Team and OET with respect to the implementation, outreach, referral, review and approval of OJT contracts to serve WIOA eligible adults.

The scope of services, expected enrollment and performance outcomes, and budget of this agreement are specified in Exhibits A and B incorporated herein by reference.

### II. BACKGROUND

A division of the Monterey County Economic Development Department, the Monterey County WDB is charged with overseeing the allocation of WIOA funds and the WIOA funded program operations of the America's Job Center of California (Job Center) delivery system in Monterey County.

In 2015-16, the Monterey County WDB received \$1,483,814 in WIOA adult formula funds to provide services to WIOA eligible adults through its Job Centers. Of this amount, \$175,000 was previously obligated for a WIOA adult subcontract. On June 24, 2014, the Monterey County WDB elected not to extend the adult subcontract for PY 2015-16 and requested that the funds be returned to the WIOA adult formula allocation to be used for the development of OJT contracts provided within the structure of the Monterey County WDB's Business Services Team in partnership with the Office for Employment Training (OET).

The WDB's Business Services Team (BST) offers a full range of coordinated services to employers that can save businesses time and money. Services range from recruitment, to receiving human resource guidance on a variety of resources and benefits, as well as coordinating OJT contracts with employers that can help jobseekers engage in productive work, while also upgrading their skills on the job.

OET is a division of the Monterey County Economic Development Department. OET is the primary WIOA adult program provider in Monterey County and manages the career services component of the Job Center delivery system in partnership with CalWORKs Employment Services (CWES) and the Wagner-Peyser Employment Services. For adults needing more intensive support, OET provides eligibility, assessment, employment training resources, supportive services, case management and follow-up services.

Through this agreement WDB will support the reimbursement of thirty (30) OJT contracts to employers for services rendered as outlined in Exhibit A of this agreement. This will augment OET's re-employment and training services.

An OJT may be provided under contract with an employer in the public, private non-profit, or private sectors. Typically, the OJT contract provides reimbursement to the employer for a portion of the wage rate of the participant for the extraordinary costs of providing training and supervision related to the training. Under this agreement, the reimbursement level will be fifty (50) percent of the wage rate.

### III. PRINCIPLES OF AGREEMENT

The general areas of responsibility between the parties of this agreement and the scope of services to be provided are detailed in Exhibit A of this agreement. Pursuant to Exhibit A, the parties expressly agree that the BST and OET shall be bound to comply with all the requirements of the WIOA as set forth in Exhibit D, and that the WDB shall oversee such activities. The parties also agree to coordinate and share available resources as part of the Monterey County's allocation of WIOA formula funds to support the OJT Program. OJT Program eligible customers are defined as adults who are 18 years and older, with a priority of service given to recipients of public assistance, other low-income individuals, individuals who are basic skills deficient, or veterans and eligible spouses.

### IV. GENERAL PROVISIONS

#### A. DISPLACEMENT

Per Welfare and Institutions Code section 11324.6, the parties agree that operation of the OJT Program shall not result in any of the following:

- (a) Displacement or partial displacement of current employees, including reductions in work hours, wages, or benefits,
- (b) Filing positions which would otherwise be promotional opportunities for current employees,
- (c) Filing of positions before complying with applicable personnel procedures or provisions of collective bargaining agreements.
- (d) Filing established vacant public agency positions, unless the positions are unfunded in the public agency's budget,
- (e) Filing positions created by an employer's termination, layoff, or reduction in workforce, etc. in order to staff positions with employees subsidized by the OJT program,
- (f) Filing positions created by a strike, lockout or other bona fide labor dispute, or filing positions in violation of existing collective bargaining agreements between employees and employers,
- (g) Filing work assignments customarily performed by workers holding job classifications within a recognized collective bargaining unit at a specific work site; filing work assignments in bargaining units with funded, vacant positions; or filling work assignments in bargaining units in which regular employees are laid off,
- (h) Early termination of a services contract, resulting in full or partial displacement of workers performing contracted services,
- (i) Denying employees/participants protections afforded other workers on the work site by state and federal laws governing workplace health, safety, and representation.

## B. INDEMNIFICATION

As the parties to this agreement are Monterey County departments, there are no indemnification or insurance requirements.

## C. TERM

This agreement shall commence effective **August 1, 2015** and remain in full force and effective through **June 30, 2016**, unless sooner terminated as provided herein. WDB may terminate this agreement by giving thirty (30) days' written notice to OET, with or without cause. If WDB terminates this agreement for good cause, WDB may proceed to direct available funding to another provider, subject to review and approval by the Monterey County Board of Supervisors. This agreement is contingent upon available funding, and may be renewed or renegotiated upon mutual written consent of both parties.

## D. CONTRACT ADMINISTRATORS

OET hereby designates **Rod Powell and Angelica Meza** as its Contract Administrators for this agreement. All matters concerning this agreement which are within the responsibility of OET shall be under the direction of, or shall be submitted to the OET Contract Administrators.

WDB hereby designates **Joyce Aldrich and Korey Woo**, as its Contract Administrators for this agreement. All matters concerning this agreement which are within the responsibility of WDB shall be under the direction of, or shall be submitted to the WDB Contract Administrators.

Either party may change its designated Contract Administrators upon giving notice pursuant to Section G - Notice.

## E. FISCAL / REPORTING

1. WDB shall serve as the fiscal agent for this agreement.
2. BST in partnership with OET will provide services under this agreement and manage the program and service delivery to the target customer population.
3. Subject to receipt of funds from the State, WDB shall approve the reimbursement of OJT contracts to employers for services rendered as outlined in Exhibit A of this agreement and in accordance with the budget detailed in Exhibit B of this agreement.
4. Funding available for the project term of **August 1, 2015** to **June 30, 2016** is \$175,000 for a total of thirty (30) OJT contracts. The budget as detailed in the attached Exhibit B shall not exceed \$175,000.
5. OJT contracts and invoices are due to the WDB fiscal office by the 15th working day of each month and shall include all obligations, expenditures and accruals incurred during the previous month, unless otherwise specified by the WDB.
6. WDB staff shall review and, if approved, direct payment of the certified invoice within 30 days of receiving the certified invoice. The final invoice must be received no later than 20 days after the close of the term of the agreement to receive reimbursement.

## F. MEETING/COMMUNICATION

OET shall provide the specified services through established processes and in compliance with applicable local, State, and Federal regulations. OET shall refer qualified customers suitable for an OJT to the BST and provide any other generated forms or reports requested by the BST for the development of the OJT contract. Meetings between OET, WDB, and BST staff shall be scheduled as needed, to discuss performance and other areas that affect either party to this agreement.

At a minimum, during the term of this agreement, the BST staff will provide management reports to the WDB staff no later than the one week prior to the meeting of the WDB Oversight Committee for the reporting month. Monthly reports will contain the following information: the total number of OJT enrollments, services provided, and cost of services. These reports may be provided using WDB standard forms provided by WDB staff. These reports shall be submitted to the WDB staff for the WDB's Oversight Committee, bi-monthly.

#### **G. NOTICE**

Notice to the parties in connection with this agreement shall be given personally, by email or by regular mail addressed to each of the following:

Rod Powell,  
OET Program Manager  
Monterey County Economic Development Dept  
Office for Employment Training (OET)  
730 La Guardia Street, 2nd Floor  
Salinas, CA 93905  
Phone (831) 755-3248  
[powellr@co.monterey.ca.us](mailto:powellr@co.monterey.ca.us)

Joyce Aldrich,  
WDB Agency Executive Director  
Monterey County Economic Development Dept  
Workforce Development Board (WDB)  
730 La Guardia Street, 2nd Floor  
Salinas, CA 93905  
Phone (831) 759-6644  
[aldrichj@co.monterey.ca.us](mailto:aldrichj@co.monterey.ca.us)

Angelica Meza,  
OET Program Supervisor  
Monterey County Economic Development Dept  
Office for Employment Training (OET)  
730 La Guardia Street, 2nd Floor  
Salinas, CA 93905  
Phone (831) 796-3365  
[mezaa@co.monterey.ca.us](mailto:mezaa@co.monterey.ca.us)

Korey Woo,  
WDB Rep III  
Monterey County Economic Development Dept  
Business Services Team (BST)  
730 La Guardia Street  
Salinas, CA 93905  
Phone (831) 796-3387  
[wookx@co.monterey.ca.us](mailto:wookx@co.monterey.ca.us)

#### **H. CONSTRUCTION, INTERPRETATION AND INTEGRATION OF AGREEMENT**

WDB/BST and OET agree that each party has fully participated in the review and revision of this agreement and that any rule of construction to the effect that ambiguities are to be resolved against the drafting party shall not apply in the interpretation of this agreement or any amendment to this agreement. In the event of any conflict or inconsistency between the provisions of this agreement and the provisions of any exhibit or other attachment to this agreement, the provisions of this agreement shall prevail and control and that the agreement shall be governed by and interpreted under the laws of the State of California and Department of Labor.

#### **I. NON-EXCLUSIVE AGREEMENT**

This agreement is non-exclusive, and the Monterey County WDB expressly reserves the right to contract with other entities for the same or similar services.

**J. EXHIBITS**

The following exhibits are attached hereto and incorporated by reference:

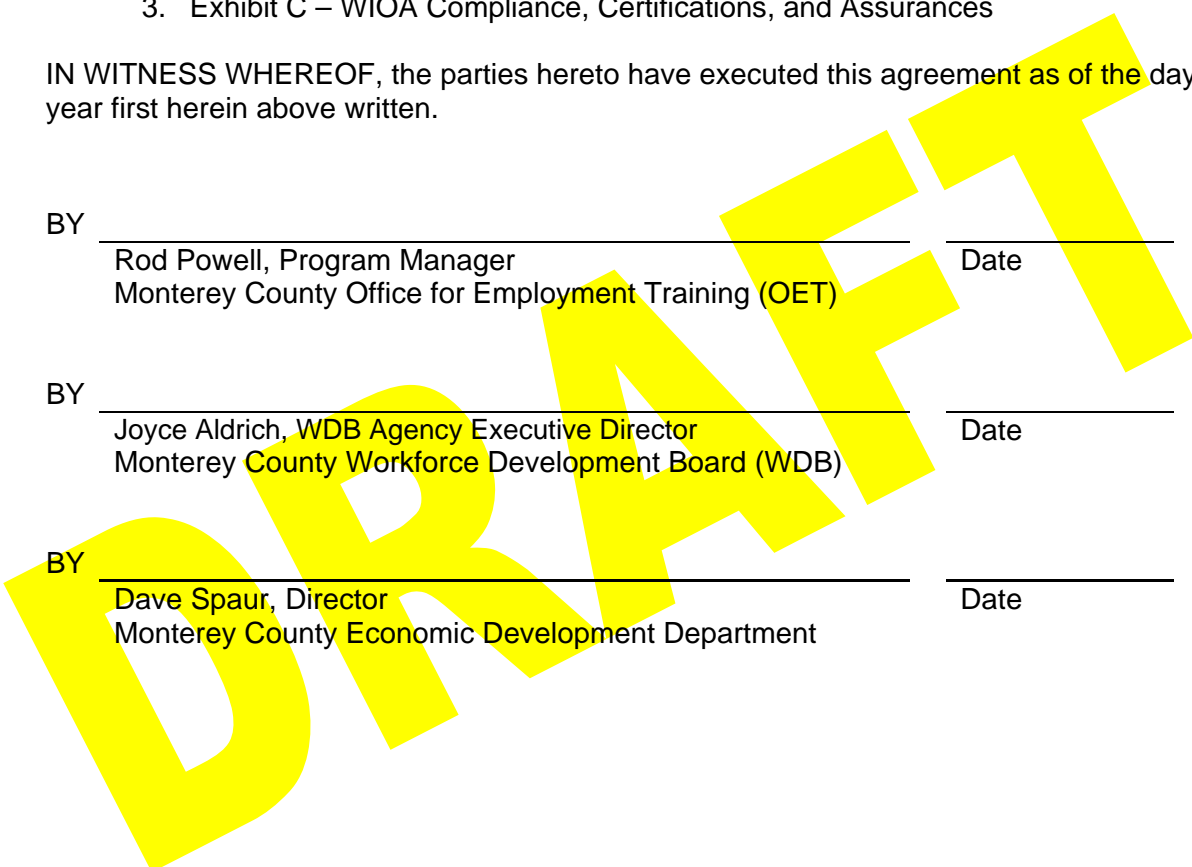
1. Exhibit A – Scope of Services (includes Enrollment & Performance Goals)
2. Exhibit B – Budget
3. Exhibit C – WIOA Compliance, Certifications, and Assurances

IN WITNESS WHEREOF, the parties hereto have executed this agreement as of the day and year first herein above written.

BY \_\_\_\_\_ Date \_\_\_\_\_  
Rod Powell, Program Manager  
Monterey County Office for Employment Training (OET)

BY \_\_\_\_\_ Date \_\_\_\_\_  
Joyce Aldrich, WDB Agency Executive Director  
Monterey County Workforce Development Board (WDB)

BY \_\_\_\_\_ Date \_\_\_\_\_  
Dave Spaur, Director  
Monterey County Economic Development Department



## EXHIBIT A

### SCOPE OF SERVICES ENROLLMENT AND PERFORMANCE GOALS

On-the-Job Training (OJT) Program  
INTER-DEPARTMENTAL AGREEMENT  
August 1, 2015 through June 30, 2016

- I. **PROJECT OVERVIEW:** The purpose of this agreement is to formalize the working relationship and establish the roles and responsibilities of the Monterey County Workforce Development Board's (WDB) Business Services Team (BST) and the Office for Employment Training (OET) with respect to the implementation, outreach, referral, review and approval of On-the-Job Training (OJT) contracts to serve Workforce Innovation and Opportunity Act (WIOA) eligible adults.
- II. **PROJECT PERIOD:** August 1, 2015 to June 30, 2016. All participants eligible for OJT contracted services and assistance under this agreement shall be enrolled by March 30, 2016.
- III. **PROGRAM PERFORMANCE OBJECTIVES:** For the period of August 1, 2015 to June 30, 2016, BST and OET shall work together to meet the following enrollment and performance goals:

<b>Enrollments:</b>	<b>Plan:</b>
On-the-Job Training (OJT) Enrollments	30

<b>Performance:</b>	<b>Target Goals</b>
Entered Employment Rate – placed in unsubsidized employment	65%*
Employment Retention Rate – Met 6-mo employment retention goal	74.5%*
Average Earnings Replacement Rate	\$10,600*
Total Exits from the Program (of total)	30 (100%)
*Credential Rate	TBD*
*In Program Skills Gain	TBD*

*\*Pending guidance from State on the WIOA performance target goals and clarification on the periods of measurement.*

#### IV. **DUTIES AND RESPONSIBILITIES:**

##### **A. ON-THE-JOB TRAINING OPERATIONAL GUIDELINES AND POLICIES:**

BST and OET staff shall adhere to the following guidelines and policies that provide guidance and other pertinent information involved in the establishment, review, approval, and invoicing of OJT contracts:

- OET – OJT Operational Guidelines, FIS 00-003 ([post on WDB website and add link](#))
- WDB Fiscal Office – Training Contract Procedures ([post on WDB website and add link](#))
- WDB Policy #2011-05 – OJT - <http://www.montereycountywib.org/policies/policies/>

##### **B. COORDINATION OF SERVICES BETWEEN BST AND OET STAFF**

1. OET staff shall email BST staff member Korey Woo at [wookx@co.monterey.ca.us](mailto:wookx@co.monterey.ca.us) a list of occupational industries that customers express interest in during the assessment process.
2. OET staff shall receive and review VOS/CalJOBS job orders sent by BST staff online by visiting: <https://www.ajccmontereycounty.org>.
3. OET staff shall identify and refer customers to the corresponding VOS/CalJOBS job order number(s), while also ensuring that all job order pre-requisites are thoroughly reviewed prior to making a referral to a participating OJT employer through the VOS/CalJOBS system.

4. OET staff shall ensure that all potential OJT customers have a ready and marketable resume available before they are referred to BST staff to be considered for an OJT opportunity.
5. OET staff shall email BST staff member Korey Woo at [wookx@co.monterey.ca.us](mailto:wookx@co.monterey.ca.us) a notification of the VOS/CalJOBS job order referral made.
6. Once the VOS/CalJOBS job order referral is made by OET, BST staff will begin to pre-screen candidate(s) for a possible OJT contract referral to a participating OJT employer once it's determined that the customer meets the minimum job requirements.
7. Once the customer is referred to an employer, the BST staff will coordinate with the customer(s) for a job interview with the participating OJT employer.
8. During the OJT contract negotiating process, BST staff will be the only point of contact with the participating OJT employers.
9. OET staff will be responsible for ensuring that employers complete a progress evaluation of all active OJT contracts on a monthly basis.
10. If a customer is offered employment through an OJT opportunity, he/she will be recommended for an updated assessment to be administered by OET staff to reflect on their current IEP goals and objectives.
11. BST staff will negotiate all OJT contracts with employers.
12. Once the OJT contract is in place, BST staff will verify the first day of work with the customer.
13. BST staff will create the OJT activity in the VOS/CalJOBS system with corresponding case notes.
14. The participant's case file will then be transferred from BST staff to OET's Adult Program Supervisor for case management assignment to include monitoring of the OJT contract.
15. OET staff shall communicate any important issues concerning the OJT contract to the BST staff to avoid placing a customer with a business that may not be following OJT policies and procedures.
16. Weekly meetings shall take place with OET case managers and BST staff to discuss any concerns or updates on existing OJT contracts or new potential customers that may benefit from an OJT opportunity.

### **C. CAREER SERVICES**

BST and OET staff shall carry out services through the America's Job Center of California in Monterey County, by ensuring WIOA career services are available to customers to include access to job order listings available in the VOS/CalJOBS system, self directed assessment and resume building tools, computers and equipment in resource rooms, and job seeker workshops. Services provided by OET staff will focus on WIOA intake and orientation for participants interested in training.

### **D. PARTICIPANT SELECTION AND ELIGIBILITY**

OET staff will select and screen participants for WIOA eligibility, and enroll selected participants into the WIOA program. All interested applicants are to be reviewed for eligibility and will be encouraged to access the Job Center career services and available job order listings in the VOS/CalJOBS system to find an OJT employer if one has not already been identified. When a participant has already been enrolled, OET staff will work with the BST staff to make every effort to develop an appropriate OJT within 30 days.

OET and BST staff will be responsible for WIOA eligibility determinations and for collecting verification documents as mandated under WIOA.

### **E. WIOA ASSESSMENT- INDIVIDUAL EMPLOYMENT PLANS**

OET staff will provide a comprehensive assessment for all participants interested in pursuing training using an Individual Employment Plan (IEP). The IEP provides OET staff with another opportunity to ensure that customers are appropriate for an OJT. OET staff may use standard web based tools available through VOS/CalJOBS and US Department of Labor (DOL) web sites or other validated employment testing and interest survey instruments such as the WorkKeys assessment. Assessments may also involve individualized research assignments, an evaluation of the participant's educational and work history and a face-to-face interview. At the time of assessment, information is to be presented on career ladders, demand

occupations, salary levels, and other incentives and resources available to customers.

Using the information gathered during the comprehensive assessment phase, OET staff will develop a mutually agreed upon IEP. OET staff will ensure that participants are screened for basic skills, complete a pre-application and/or equivalent, and ensure that adequate information about the need for training, as specified on the IEP, is on record.

The IEP and assessment documents on record may include the following information:

- Personal information (with participants signed release);
- Interests, skills and work readiness information;
- Educational and employment history;
- Financial situation as it relates to employment goals;
- Short and long term employment goals;
- Barriers to employment / advancement and plan to mitigate barriers; and
- Physical accommodations related to employment needs.

## **F. TRAINING SERVICES**

Under this agreement, an OJT contract is expected to be the priority service to help customers become re-employed.

For OJT opportunities, BST staff will seek to identify and work closely with successful employers that offer employment opportunities including company sponsored training, benefits (health, and other), promotional opportunities, and stable employment. BST staff will maintain a list of job orders in the VOS/CalJOBS system to assist staff and participants in identifying potential OJT employers. BST and OET staff shall follow the OJT Operational Guidelines and WDB Fiscal Office – Training Contract Procedures that provide guidance and other pertinent information involved in the establishment, review, approval, and invoicing of an OJT contract for WIOA eligible adults.

## **G. EMPLOYER OJT CONTRACTS**

BST staff will be responsible for assuring that selected employers have:

- Federal and state tax identification numbers;
- Workers' compensation insurance;
- Reasonable business history and business license;
- Identifiable job with corresponding equipment, materials and supervision to perform the training;
- Ability to commit to skill training outline;
- Ability to enhance marketable skills of OJT employee;
- Ability to support assurances of OJT contract;
- Accounting system that allows for tracking of OJT employee salaries and invoicing procedures; and
- Employer progress evaluation of OJT.

In accordance with the OET – OJT Operational Guidelines, the *OJT Employer Contract* form shall be used. BST staff in partnership with OET will be responsible for assuring that the:

- OJT matches the minimum requirements stated in the VOS/CalJOBS job order;
- OJT contract is well matched to the participant's occupational interest;
- OJT placements are matched to the participant's required working conditions;
- OJT position is matched to the participant's financial situation; and
- OJT training is well matched to the skills the participant needs to acquire in order to continue in on-going unsubsidized employment.

All contracts will include a job specific training plan, using the O.NET occupations and related job descriptions. The participant's education and work history will be used as a guide in determining the length of each participant's OJT contract. The length of training time shall not exceed three (3) months. OJT contracts will be for full-time employment (30 hours or more per week).



Employers with whom OJT contracts are written will be reimbursed by the WDB's Fiscal Office, from the OJT set-aside as indicated in Exhibit B of this agreement, for extraordinary costs associated with training at a rate not to exceed 50% of a participant's wages during the OJT contract period. All skills training will be provided by the employer as specified in the *OJT Employer Contract*. The WDB Fiscal Office will pay the employer directly for OJT training costs (50% wage reimbursement) based on valid invoices submitted to WDB Fiscal Office within fifteen (15) days after the end of each month or reporting period. Invoices will be supported by time cards, reviewed for accuracy, and certified by the OET staff.

OJT contracts will be written with employers that have not been deficient in their conduct or participation in any U.S. DOL, State of California, or Monterey County employment and training program. Health and safety standards established under state and federal law, otherwise applicable to working conditions of employees, shall be equally applicable to working conditions of participants. To the extent that a State Workers' Compensation law is applicable, benefits in accordance with such law shall be available with respect to injuries suffered by participants. All participants shall be provided benefits and working conditions at the same level and to the same extent as other employees working a similar length of time and doing the same type of work. For unionized employers, compliance with collective bargaining agreements will be observed and signatures of concurrence obtained.

#### **H. CASE MANAGEMENT**

OET staff will provide case management services throughout each participant's OJT contract period and during the post placement follow-up period.

Case management activities include, but are not limited to, the following:

- Training site visits (monthly during the OJT training period);
- Contact with participants during crucial training, start-up and wind-down periods by telephone;
- Arranging for supportive services indicated in the IEP or requested by the participant or employer;
- Arranging and coordinating additional assessment for special skills, as appropriate;
- Facilitating participant problem resolution (s);
- Completing all activities in VOS/CalJOBS that track the participant while enrolled in the program until WIOA program exit;
- Employer completion of OJT progress evaluation; and
- Ensure OJT employee is placed into unsubsidized employment upon completion of training.

#### **I. JOB SITE MONITORING**

OET staff will visit the worksite monthly to assess training progress and monitor the validity and propriety of amounts claimed for reimbursement. Monitoring visits and all other contacts with either the participant or the employer related to training will be documented in the VOS/CalJOBS system case record. Additionally, an OJT evaluation will be completed and signed by the participant's supervisor and the participant each month. A copy of the evaluation, will be given to the employer, a second copy will be filed in the physical case file maintained by the OET case manager. Claims submitted to the WDB Fiscal Office are to be substantiated by copies of payroll, time and attendance records.

#### **J. FOLLOW-UP AND RETENTION SERVICES**

OET staff will ensure that participants are surveyed and provided a customer satisfaction feedback form, upon completion of the OJT contract to rate the training services and program. OET staff will be responsible for providing all follow up services on a monthly basis to ensure performance goals are met and participants are placed into permanent unsubsidized employment upon completion of training. All contact made in person or by phone with the participant should be documented in the participant's VOS/CalJOBS record.

## EXHIBIT B

### BUDGET

On-the-Job Training (OJT) Program  
INTER-DEPARTMENTAL AGREEMENT  
August 1, 2015 through June 30, 2016

Budget Detail	Planned Expenditures
BST Staff Salaries & Benefits	\$73,550
On-the-Job Training (OJT) Set-aside	\$101,450
<b>Total Agreement Obligation:</b>	<b>\$175,000</b>
*SB734 Leveraged OJT Employer Contribution	TBD based on total OJT contract reimbursement

Quarterly Expenditures & Leveraged \$ (Cumulative Totals)	Sep 2015	Dec 2015	Mar 2016	Jun 2016
OJT Expenditures	\$45,750	\$87,500	\$131,250	\$175,000
*SB734 Leveraged OJT Employer Contribution	TBD	TBD	TBD	TBD

Subject to receipt of funds from the State, WDB shall approve the reimbursement of OJT contracts to employers for services rendered as outlined in Exhibit A. The budget total shall not exceed \$175,000.

Up to 30 eligible adults will be enrolled in the OJT program. Of these enrollments all are to receive training services for an estimated cost of \$3,382 per person.

\*Per Senate Bill (SB) 734, ten percent (10%) of the local WDB's minimum training expenditure requirement may be met by applying leveraged resources used for training services. Leveraged resources may include matching funds from employers including the employer-paid portion of an OJT contract.

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# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR

**SUBJECT:** CONCUR WITH THE JULY 15, 2015 EXECUTIVE COMMITTEE ACTION TO APPROVE THE RECOMMENDATIONS REGARDING THE STATE EMPLOYMENT DEVELOPMENT DEPARTMENT DRAFT DIRECTIVES OPEN FOR COMMENT INCLUDING: WORKFORCE SERVICES DRAFT DIRECTIVE (WSDD)-117 – WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) YOUTH PROGRAM REQUIREMENTS; WSDD-118 LOCAL BOARD RECERTIFICATION; AND WSDD-119 WIOA ADULT PROGRAM PRIORITY OF SERVICE

**DATE:** AUGUST 5, 2015

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board concur with the July 15, 2015 Executive Committee action to approve the recommendations regarding the State Employment Development Department Draft Directives open for comment including: Workforce Services Draft Directive (WSDD)-117 – Workforce Innovation and Opportunity Act (WIOA) Youth Program Requirements; WSDD-118 Local Board Recertification; and WSDD-119 WIOA Adult Program Priority of Service.

**INFORMATION:**

State EDD Workforce Services Draft Directive Transmittal Number **WSDD-117**, WIOA Youth Program Requirements provides guidance and establishes the procedures regarding the Workforce Innovation and Opportunity Act (WIOA) youth program, including the 75 percent out-of-school (OS) youth and 20 percent work experience minimum expenditure requirements.

**Policy and Procedures:**

Youth Eligibility Criteria –

WIOA section 129(a) (1) provides new eligibility criteria for the WIOA youth program. To be eligible to participate in the WIOA program, an individual must be an out of school youth or an in-school youth enrolled beginning July 1, 2015 must meet the new eligibility criteria.

The Draft Directive recognizes that some local areas may not be immediately prepared to spend at least 75 percent of their PY 2015-16 youth funds on out of school (OS) youth. These local areas must demonstrate progress towards meeting the requirement through increased expenditures on OS youth compared to PY 2014-15 youth expenditures. Specifically, by June 30, 2016, local areas must increase their PY 2015-16 OS youth expenditures by at least 10 % points over their PY 2014-15 OS youth expenditures, and have a minimum OS youth expenditure rate of 50 percent.

Additionally, Local boards must establish local policies regarding work experience. At a minimum, these policies need to define the following:

- The duration of the work experience assignment;
- Limitations on the number of hours; and
- Appropriate incentives and stipends, including limitations on the types and dollar amount.

Work Experience Expenditure Requirement:

Local areas must spend at least 20 percent of their WIOA youth formula allocation on work experience (WIOA Section 129(c)[4].

**Comments due by July 17, 2015.**

State EDD Workforce Services Draft Directive Transmittal Number **WSDD-118**, WIOA Local Board Recertification. The policy provides guidance and establishes the procedures regarding the recertification of Local Workforce Development Boards under the WIOA. Local board recertification is effective July 1, **2016** through June 30, 2018. The Directive contains state-imposed requirements and is indicated by bold, italic type in the Draft itself. Of interest includes the following:

- 1) Local boards must meet the membership provisions established in WIOA Section 107(b) and CUIC Section 14202(c) by March 31, 2016. (handout at meeting)
- 2) Local board must have achieved 80 percent or higher on at least eight of the nine locally negotiated common performance measures for PYs 2013-14 and 2014-15.
- 3) A local Board has not been placed on cash hold for longer than 30 days
- 4) Local Board demonstrated substantial progress toward implementing Key WIOA Provisions such as:
  - meeting new youth service requirements
  - procuring America's Job Center of California (AJCC) operators (unless granted a waiver under WIOA Section 121(d)[1][A]
  - procuring AJCC career services providers (unless granted a waiver under WIPA Section 107 [g][2])
  - adhering to the new Uniform Guidance requirements
  - establishing memorandums of understanding with local partners
  - developing sector initiatives and career pathways in high demand industries in coordination with community colleges, apprenticeship programs, adult basic education, and other training providers
  - Adopting, implementing, and promoting the AJCC brand.

Recertification request must be submitted to the State Board no later than March 30, 2016.

**Comments due by August 7, 2015.**

State EDD Workforce Services Draft Directive Transmittal Number **WSDD-119**, WIOA Adult Program Priority of Service. Provides guidance and establishes the procedures regarding priority of service for recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient serviced with Workforce Innovation and Opportunity Act adult funds.

Under WIA funds allocated to a local area for adult employment and training activities were limited priority of service was to be provided to recipients of public assistance and other low-income individuals for intensive services and training services.

WIOA made several changes to the priority of service requirement by adding individuals who are basic skills deficient as a priority population, changing intensive services to career individualized services, and removing the provision stating priority of service is only applied if funding is limited.

Veterans and eligible spouses continue to receive priority of service for all DOL funded programs amongst all participants. These requirements were not affected by the passage of WIOA and must still be applied in accordance with guidance previously issued by the DOL and Workforce Services Directive WSD08-10.

Changes do include the following:

Priority of Service Requirement

The state has defined the term “priority” to mean that 51 percent or more of the participants served with WIOA adult funds must be either low-income, recipients of public assistance, or basic skills deficient.

Definitions

Criteria used to determine whether an individual is basic skills deficient includes the following:

- lacks a high school diploma or high school equivalency and is not enrolled in secondary education
- enrolled in a Title II Adult Education/Literacy program
- English, reading, writing, or computing skills at an 8.9 or below grade level
- Determined to be Limited English Skills proficient through staff-documented observations
- Other objective criteria determined to be appropriate by the local area and documented in its required policy.

**Comments due by July 15, 5:00 pm, 2015.**

# MEMORANDUM

**TO:** WORKFORCE DEVELOPMENT BOARD

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR

**SUBJECT:** CONCUR WITH THE JULY 27, 2015 YOUTH COMMITTEE ACTION TO ACCEPT PROGRAM YEAR 2014-15 CLOSE OUT PROGRAM REPORTS ON WORKFORCE INVESTMENT ACT (WIA) YOUTH FORMULA FUNDS, YOUTH EMPLOYMENT LEADERSHIP, SILVER STAR, AND WORKFORCE ACCELERATOR FUND 1.0

**DATE:** AUGUST 5, 2015

**INFORMATION:**

It is recommended that the Workforce Development Board concur with the July 27, 2015 Youth Committee action to accept program year 2014-15 close out reports for Workforce Investment Act (WIA) Youth formula funds, Youth Employment Leadership Program (YELD), SilverStar, and Workforce Accelerator Fund 1.0.

**DISCUSSION:**

**Expenditures:** As of June 30, 2015, Monterey County expended 86% or \$1,357,962 of its WIA Youth formula funds, as follows:

Local WIA Budget	WIA Youth
Carry-In funds from Program Year (PY) 2013-14	\$200,346
PY 2014-15 Allocation	\$1,384,902
<b>Total Budget</b>	<b>\$1,585,248</b>
<b>Year to Date (YTD) Expenditures through June 30, 2015</b>	<b>\$1,357,962</b>
Balance	\$227,286
Percent Expended	86%

**Enrollments:** As of June 30, 2015, Monterey County enrolled 237 (83%) new/carry-in participants. Of those enrollments, 109 (83%) represent new youth participants as shown below.

Youth	Local Plan 2013-14* Enrollments (includes carry-in)	Actual	% Local Plan
Carry-In	154	128	83%
New	131	109	83%
Total	285	237	83%

*\*Plan numbers represent the State approved participant plan for Program Year 2013-14. The Plan numbers also include carry-in enrollments from the previous program year.*

**Performance Measures:** The following table displays Monterey County's local success levels with meeting the Common Measure Youth performance goals as of the 4<sup>th</sup> Quarter period.

To date, Monterey County exceeded the minimum 80% target level goals for youth that attained a degree or certificate at 94.75% and youth that increased their functioning levels in literacy (reading) and/or numeracy (math) at 82.32%. Monterey County is below goal for youth who entered employment or education at 79.44%.

<b>Youth Performance Measures</b>	<b>Target Goal</b>	<b>Actual %</b>	<b>Local Success Level</b>	<b>Met 100% Goal?</b>	<b>Met 80% Target?</b>
<b>Entered Employment or Education</b>	70.0%	55.61%	<b>79.44%**</b>	No	No
<b>Attained Degree or Certificate</b>	64.0%	60.64%	<b>94.75%</b>	No	Yes
<b>Literacy and/or Numeracy Gains</b>	59.0%	48.57%	<b>82.32%</b>	No	Yes

\*\*WDB staff is currently working with the State to resolve several system discrepancies that are impacting Monterey County’s youth entered employment or education performance outcomes.

**Program Provider Reports:**

The following reports provide a summary of the youth provider’s performance for PY 2014-15.

- Office for Employment Training – Reference attached WIA youth program performance.
- Turning Point of Central California – Reference attached WIA youth program performance.
- Office for Employment Training – Reference attached YELD program update.
- Office for Employment Training – Reference attached Silver Star program update.
- Workforce Development Board – Reference attached Workforce Accelerator Fund 1.0 close out report.



**Monterey County Workforce Development Board  
Workforce Investment Act (WIA) Title I – YOUTH PROGRAM SERVICES**

**Provider:** Office for Employment Training

**For the period ending:** June 30, 2015– Program Year 2014-2015 – FINAL CLOSE OUT

**ENROLLMENT GOALS**

Monthly Participant Plan Summary	TARGET GOAL	YTD Actual	% of Goal
1. Total # of CARRY-IN enrollments	154	128	83%
2. Total # of NEW enrollments	120	62	52%
3. Total # of ALL enrollments	274	190	69%

**PROGRAM SERVICES**

Participant Plan Summary	Target Goal	YTD Actual	%
1. Total # of Youth enrolled in Year-Round Work Experience	-	0	
2. Total # of Youth enrolled in Summer Youth Work Experience (SYEP)	120	68	57%

**INDUSTRY CLUSTERS – PLACEMENTS**

Work Experience Placements	YTD Actual	%
Total # and percentage of work experience placements, based on the following industry clusters	68	100%
Agriculture	0	0%
Building/Design: construction	0	0%
Healthcare	2	3%
Education	8	12%
Hospitality/Tourism: Driver, Host	0	0%
Creative/Technology	0	0%
Other (Finance, Retail, Sales, etc.)	58	85%

**GEOGRAPHIC AREAS SERVED**

Period ending <u>June 2015</u>	TARGET GOAL	MINIMUM GOAL	Actual <i>All</i>	% of Actual
Central (Salinas)	55%	10%	105	55%
North	11%	10%	15	8%
South	18%	10%	43	22%
West	16%	10%	22	12%
Outside of Monterey County	16%	0	5	3%

**TARGET POPULATIONS SERVED**

Period ending <u>June 2015</u>	TARGET GOAL	Actual	% of All Enrollments
Homeless	2%	6	3%
Out-of-School Youth	20%	59	32%
Offenders	20%	49	25%
Individual with Disability	20%	24	13%
TANF/GA/RCA/SSI/Food Stamps	20%	50	26%
Foster Care	5%	2	1%

**CURRENT PROGRAM ACTIVITIES**

- Continued Case Closures and Retention Activities
- NRF Customer Service and ServeSafe Certification
- Life Skills Workshops
- Academic Monitoring
- Assistance with Post-secondary institution and Financial Aid applications
- OOSY Training in Santa Barbara with Rick Record
- County-wide Outreach and Pre-application distribution
- Eligibility and Orientation Sessions
- Employment Partner recruitment and confirmation





**Monterey County Workforce Development Board**  
**Workforce Investment Act (WIA) Title I – Youth Subcontract Monthly Report**

**Subcontractor:** Turning Point of Central California (located at Rancho Cielo)

**Budget:** 110,000

**Program Design:** to provide occupational skills training, leadership development, mentoring, guidance and counseling and supportive services to **45** WIA eligible youth (16 to 21) who face multiple barriers to employment, are low-income, and are included in one or more of the following categories listed in the target population section of the table below. **32** will be enrolled in tutoring and alternative secondary school activities. **28** will receive paid and unpaid work experience opportunities. The majority of youth are court involved and are referred to the program from agencies throughout the county.

**For the period ending:** June 30, 2015– Program Year 2014-2015 – FINAL CLOSE OUT

**ENROLLMENT GOALS**

Monthly Participant Plan Summary	Total TARGET GOAL	Cumulative Monthly Plan	YTD Monthly Actual	Monthly %
1. Total # of CARRY-IN enrollments	0	0	0	0%
2. Total # of NEW enrollments	45	45	47	104%
3. Total # of ALL enrollments	45	45	47	104%
4. Total # of paid and unpaid work experience enrollments	28	28	30	107%
5. Total # of youth who complete certification program		0		

**INDUSTRY CLUSTERS – PLACEMENTS**

Work Experience Monthly Placements	Total #	% of Total
Total # and percentage of work experience placements, based on the following industry clusters:	30	100%
Agriculture	0	0%
Tourism/ Hospitality: <b>Culinary Institute, Pizza Factory</b>	10	33%
Education & Research	0	0%
Health & Social Assistance	0	0%
Other: <b>N. County Recreational Center, YMCA, GameStop, Foot Locker, Carl's Jr. Journeys, Work World, Marshalls, Walgreens, CVS</b>	20	67%

**GEOGRAPHIC AREAS SERVED**

Quarter ending <u>June 2013</u>	TARGET GOAL	YTD Actual	% of Actual
<i>*Turning Point is contracted to meet these target goals focusing on Central/South County areas:</i>			
Central (Salinas)	55%	19	40%
South	18%	14	30%
West	16%	8	17%
North	11%	6	13%

**TARGET POPULATIONS SERVED**

Quarter ending <u>June 2013</u>	TARGET GOAL*	YTD Actual	% of Actual
<i>* Turning Point is contracted to meet these target goals:</i>			
Out-of-School Youth	12%	14	30%
TANF/Food Stamps	6%	18	38%
Disabled Youth	29%	37	79%
Offenders	40%	29	62%
Foster Care	8%	8	17%
Homeless	5%	7	15%

**PERFORMANCE GOALS**

Quarter ending <u>N/A</u>	Plan	Actual
1. Total number of exits	45	47
2. Placement in Employment or Education	70.1%	24(51%)
3. Attainment of a Degree or Certificate	64.3%	21(45%)
4. Literacy and Numeracy Gains ( <i>Out-of-School Youth</i> )	61.0%	7 (50%)

**YOUTH ACTIVITIES**

3 additional youth who entered unsubsidized employment.

- (1) Youth in Hospitality
- (1) Agriculture
- (1) Retail



**Monterey County Workforce Development Board  
Youth Employment and Leadership Development (YELD) Program Services**

Provider: Office for Employment Training

For the period ending: June 30, 2015 – Program Year 2014-15

**ENROLLMENT GOALS**

YOUTH (Ages 16-24)	Target Goal	YTD Actual	% of Goal
1. Total # of Referrals	n/a**	101	n/a**

\*\*There are no minimum referral goals established for this program.

**PROGRAM SERVICES**

Participant Plan Summary (based on total referrals)	Target Goal	YTD Actual	% of Target Goal
1. Total # of youth enrolled in work experience	40	39	97.50%
2. Total # of those HIRED	39	20	51.28%
3. Total # of those who got a JOB ON THEIR OWN	39	5	12.80%
4. Total # of those who were HIRED and QUIT	39	8	20.50%
5. Employer Assistance Program (EAP) Referral	39	1	2.50%
6. Total # dropped out of program	39	6	15.00%

**EDUCATION SERVICES**

	Actual All	% of YTD Actual (39)
1. Total # of those who GRADUATED HIGH SCHOOL	2	5.1%
2. Total # of those who OBTAINED GED	3	7.7%
<b>TOTAL</b>	<b>5</b>	<b>12.8%</b>

**WORKEXPRIENCE LOCATIONS**

- Ace Hardware
  - A. Oseguera Co.
  - Dr. Rita Lee
  - Family Fitness Soledad
  - Famous Dave's
  - Game Stop
  - Hidden Hills Ranch
  - Jamba Juice
  - Maya Cinemas
  - MY Chevrolet
  - My Nissan
  - Napa Auto
  - NMC
- S&E Dollar Store
  - Salinas Valley Optometric
  - Sang's Restaurant
  - Soccer City
  - Soledad Cemetery
  - T&P Aero Refinishers
  - Tech guys
  - Walgreen's – Marina
  - Walgreen's – N. Main
  - Walgreen's – Sanborn Rd.
  - Walgreen's – Seaside
  - Wet Seal
  - YMCA - Soledad



**Monterey County Workforce Development Board  
SILVERSTAR PROGRAM SERVICES**

**Provider:** Office for Employment Training

**For the period ending:** June 30, 2015 – Program Year 2014-2015

**ENROLLMENT GOALS**

<b>YOUTH (Ages 14-21)</b>	<b>Target Goal</b>	<b>YTD Actual</b>	<b>% of Goal</b>
1. Total # of Referrals	n/a*	122	n/a*

\*There are no minimum referral goals established for this program.

**PROGRAM SERVICES**

<b>Participant Plan Summary (based on total referrals)</b>	<b>Target Goal</b>	<b>YTD Actual</b>	<b>% of Goal</b>
1. Total # of youth enrolled in work experience	20	36	180%
2. Total # of those HIRED	n/a**	4	n/a**
3. Total # of those who got a JOB ON THEIR OWN (Two @ Fresh Express and one @ Taylor Farms)	n/a**	3	n/a**

\*\* Employment after work experience is not a target goal. Upon completion of a work experience opportunity, many youth return to high school or enter post-secondary education full time and are not looking to secure employment after they complete their work experience.

**EDUCATION & REFERRAL SERVICES**

<b>GPA must be at least 2.0 to qualify</b>	<b>Total Youth</b>	<b>% of YTD Actual (36)</b>
1. GPA below 2.0; too low to qualify	9	25%
2. Incarcerated	6	16.6%
3. Deceased	1	2.7%
4. Referred to Central Coast Center for Independent Living (CCCIL)	1	2.7%
5. Referred to KickStart – AB109	1	2.7%
6. Referred to Youth Employment & Leadership Development (YELD)	1	2.7%
7. Referred to America’s Job Center of California (AJCC) for Workshops	1	2.7%
<b>TOTAL</b>	<b>20</b>	<b>55.56%</b>

**WORK EXPERIENCE LOCATIONS**

- Carl’s Jr – Davis Rd
- Foot Locker
- Game Stop
- Kid’s Foot Locker
- Laguna Seca
- NMC – Materials
- NMC - Reception
- Salinas Animal Shelter
- Soledad Library
- Walgreen’s Marina
- Walgreen’s N. Main
- Walgreen’s Sanborn
- Walgreen’s Seaside
- YMCA - Soledad

## WORKFORCE ACCELERATOR FUND 1.0

### CLOSEOUT End of Project Report

**Instructions:** The End of Project Report can be submitted electronically to the assigned project manager. Address questions regarding the completion of the report to Kae Chin, Project Manager at (916) 654-9695. [kae.chin@edd.ca.gov](mailto:kae.chin@edd.ca.gov)

**Subrecipient Name:** Monterey County Workforce Investment Board **Date:** 04/30/2015

**Contact Person:** Joyce Aldrich/Terri Gallardo **Phone:** (831) 796-6644/(831) 796-6410

**Subgrant #:** K491029

**Project Name:** Ambassadors for Peace Magnet Program

I. List your project's original goals and objectives in column A. Provide the outcomes achieved in column B for each of the goals and objectives. Note: You can also add other outcomes resulting from your project in column B.

		<b>Column A</b>	<b>Column B</b>
1.	<b>Enrollments</b> (a) Unemployed and underemployed (b) incumbent	40 disconnected youth on public assistance to be Referred and Enrolled	Pilot Project (YELD) in progress through 6/30/2015. To date, 101 Referrals and Enrollments: (a) 100 unemployed (b) 1 underemployed
2.	<b>Placement in Training</b>	20 disconnected youth on public assistance to be placed in paid or unpaid internships (subsidized work experience training)	Pilot Project (YELD) in progress through 6/30/2015. To date, 54 placed in paid internships (subsidized work experience training)
3.	<b>Completed training</b>	20 disconnected youth on public assistance to complete paid or unpaid internships (subsidized work experience training)	Pilot Project (YELD) in progress through 6/30/2015. To date, 11 completed paid internships (subsidized work experience training)
4.	<b>Attained Recognized Certificate</b>	Objective of concept is to engage enrolled youth with school through a minimum level of a high school diploma and another credential path or career pathway	Pilot Project (YELD) in progress through 6/30/2015
5.	<b>Placement in Unsubsidized Employment</b>	Objective of concept is to break the cycle of generational public assistance through employment, education and community engagement	Pilot Project (YELD) in progress through 6/30/2015. To date, 9 achieved placement in Unsubsidized Employment  Ongoing Job Retention, Education/College Prep, Civic/Leadership Activities.
6.	<b>Retained Employment (6 months)</b>	Objective of concept is to break the generational cycle of dependency on public assistance. Strategies to mediate include employment, pursuit of advanced level of education and community engagement	Pilot Project (YELD) in progress through 6/30/2015  Ongoing Job Placement, Education/College Prep, Civic/Leadership Activities

II. What were your project's greatest achievements?

The foremost accomplishment of the *Ambassadors for Peace Magnet Program* was the evolution of relationships with new partners which have led to the availability of enhanced resources and augmentation of existing service strategies for disengaged youth. These collaborations, currently based upon identified similarities of the target population and goals, could be formalized for future endeavors. In the interim, alliances to serve YELD enrollees have been solidified through agreed upon common objectives to address indicator characteristics which have negatively influenced many youth in our community. The preponderance of time investment for this project was identifying potential stakeholders and establishing systems by which to address observed challenges encountered by youth enrolled in YELD.

Civic, Leadership and Mentoring opportunities for YELD enrollees and future analogous programs have potential for expansion attributable to the aforementioned partner development.

A concept program, Monterey County Workforce Investment Board Accelerator Fund Program (MCWIB Accelerator Fund Program), based upon observation of YELD in progress and causal indicator research, was designed to address systematic obstacles intended to serve as a basis for future ventures. The concept program is a culmination of information gathered from observation of the initial pilot program, stakeholder partner development and research to identify evidence based strategies that are efficient and have potential for replication in other regions. In addition, an elemental design feature of the concept program is the utilization of existing tools for delivery of several components. This aspect of the program is economical and promotes the use of tools developed by reputable organizations, many of which are government departments.

III. A. What role did your partners play in your project?

**Monterey County Department of Social Services (DSS)** provided funding, identified and referred YELD participants to the Office for Employment Training (OET). In addition, DSS served a pivotal role in accessing services for enrollees in need of Behavioral Health assistance. Supportive services, when eligibility through DSS was possible, were managed by the corresponding DSS case manager. The ease of service coordination for YELD enrollees was facilitated by both DSS and OET staff.

**San Benito County Workforce Investment Board (San Benito County WIB)** interest in this project will potentially lead to future replication and implementation in San Benito County. YELD was a pilot project dependent upon funding from Monterey County DSS. San Benito County WIB will benefit, as will the region, from the sharing of best practice strategies learned through YELD.

**Santa Cruz County Workforce Investment Board (Santa Cruz County WIB)** interest in this project will potentially lead to future implementation in Santa Cruz County. YELD was a pilot project dependent upon funding from Monterey County DSS. Santa Cruz County WIB will benefit, as will the region, from the sharing of best practice strategies learned through YELD.

B. How was their role beneficial to the project?

**Office for Employment Training:** assurance of work eligibility and assessment of individuals referred to receive YELD services, provision of intensive case management, job development, job placement and referral to other programs to address barriers to program participation.

**Monterey County Department of Social Services:** funding for supportive services increased the ability for YELD to serve more youth than originally anticipated. The identification of baseline Temporary Assistance for Needy Families (TANF) youth was supported by the referral system used by DSS. Service access for youth in need of Behavioral Health assistance was facilitated by DSS.

**San Benito County Workforce Investment Board:** should the concept program (Monterey County WIB Accelerator Program) be implemented by the San Benito County WIB, the entire region will benefit economically through engagement in education and employment by disengaged youth residing in San Benito County.

**Santa Cruz County Workforce Investment Board:** should the concept program (Monterey County WIB Accelerator Program) be implemented by the Santa Cruz County WIB, the entire region will benefit economically through engagement in education and employment by disengaged youth residing in Santa Cruz County.

- IV. A. What project implementation and operational challenges did you encounter?
1. Referrals of youth by DSS included those who were no longer eligible.
  2. Identification of youth involved in gang activities was largely based upon self identification. As a result, unless a youth disclosed a criminal conviction for gang related activity, determining an accurate baseline of gang involved youth was not possible.
  3. Funding streams from DSS could not be utilized on a regional basis.
  4. Youth referred were not aware of available services or of agency collaboration.
  5. Mentor opportunities are limited and not appropriate for most youth referred for YELD participation. Many youth referred to YELD are basic skills deficient and the preponderance of mentor positions involve academic tutoring of younger children.
  6. Apprenticeship opportunities are limited (one in the County of Monterey) and not easily accessible by most due to the geographic location of the Apprenticeship Program.
- B. What steps did you take to overcome them?
1. DSS engagement of a highly responsive program coordinator to assure eligibility.
  2. Silver Star, a program that is comprised of a collaboration of agencies that serve primarily youth on probation, assisted with gang identification of some YELD participants.
  3. Future programs in adjacent areas, such as San Benito County and Santa Cruz County, may replicate YELD and incorporate best practices included in the concept program.
  4. Case Management staff adjusted initial orientation discussions to assure YELD referral awareness of agency collaboration and available program services.
  5. Several mentor opportunities were identified through Workforce Accelerator Fund stakeholder interviews. Although most are available on a sporadic basis in Monterey County, collaborations with area agencies with initiative to improve the lives of disengaged youth have resulted in increased mentor opportunities. One position which involves inter-generational cross mentoring was identified at *Loaves, Fishes and Computers*—youth who have knowledge of computer operations and of social media applications will mentor the elderly and disabled living in area nursing homes to enable regular contact with family and friends.
  6. Stakeholders that expressed interest in pursuing apprenticeship certification were provided with resources to encourage and support their mission.
- C. Did you make any changes to the original project design after the initial subgrant was established?  Yes  No

*If yes, what changes did you make and why?* Identification of stakeholders was instrumental to beginning the process of engagement of YELD youth with their community. Initially, although one of the YELD focus areas was community engagement, few opportunities were readily identifiable. The connection to what were new partners supported this initiative.

System standardization was encouraged to prevent confusion of YELD enrollees and to conserve resources. Instead of individualized coaching by case management staff, some subject areas (i.e. job readiness, career planning and preparation for advanced level education) are now presented in a group workshop setting. This service modality serves to both connect disengaged youth with a common goal of self improvement and to conserve resources.

Inclusion of opportunities with potential for long term career path development were explored through work experience. Both private and public sector employment work-sites have been used to achieve this objective. Initially, YELD enrollees selected work experience sites based on short term occupational aspirations instead of those that offered more advanced skill attainment opportunities. YELD enrollees who were asked to conduct career exploration were more apt to select work experience opportunities that were in alignment with long term career aspirations. The reason for the inclusion of work experience work sites with potential for advanced career pathway development was to allow for objective and non-objective skill attainment.

Use of data retention in the *Virtual One Stop*, a case management system primarily used for WIA performance based programs, became standardized. The use of a common data management system aided the case management staff to support service strategies developed by other case management team members.

- V. What other resources and/or technical assistance would have been helpful?  
Additional regional convening of other Workforce Accelerator Fund recipients serving similar population groups may have prevented duplication of efforts and cultivated sharing of lessons learned. Alternately, independent program development will likely result in a better understanding of strategies that are most suitable for replication across regions.
- VI. What did you learn from this experience and will it change how you do business?  
Lessons learned were incorporated into the concept program design and include:
- Need for streamlined processes for inter-agency service access
  - Significance of addressing primary challenges before commencing even the most elementary services. Similar to Maslow's hierarchy of needs five-stage model, basic challenges of disengaged youth (food, shelter, safety and establishing a sense of belonging) must be addressed prior to engagement in activities designed to achieve financial independence and self sustainability.
  - Incorporation of existing career planning and life skills tools is the most cost efficient method of program operation.
  - Partnerships both through formal or informal agreements, reduces duplication of services and improves potential for positive program outcomes.
  - Taking time to explore the mission of other agencies contributes to innovative solutions to address program service challenges.
- VII. Will this project be continued?  
The YELD project will continue through June 30, 2015. Continuance of project discussions are ongoing.
- VIII. Additional comments:  
The ability to dedicate resources to conduct research to identify indicators which lead to gang involvement, generational reliance on public assistance and 21<sup>st</sup> Century skill attainment needs of employers was invaluable to the creation of the concept program design. The concept program will provide a fiscally responsible methodology to address challenges encountered in YELD.

A desired outcome of WAF should be the continuance of project "incubation" opportunities to improve service provision of disengaged youth.

# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR

**SUBJECT:** A PROPOSED NEW ELIGIBLE TRAINING PROVIDER LIST MASTER AGREEMENT WITH HARTNELL COLLEGE

**DATE:** AUGUST 5, 2015

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board (WDB) approve proposed new Eligible Training Provider List Master Agreement with Hartnell College.

**INFORMATION:**

In accordance with the Eligible Training Provider List (ETPL) policy and procedures, local boards are responsible for accepting applications from training providers to be listed on the ETPL.

Local boards must also have agreements with approved training providers that include provisions requiring providers to maintain sufficient records and to make these records available for monitoring or audit by either the local board or the State.

Hartnell College meets all the requirements in order to business with the Monterey County WDB.

This recommendation requests approval to enter into a Master Agreement between the WDB and Hartnell College.

**ATTACHMENT:** Hartnell ETPL Master Agreement. (Exhibits are on file at the WDB offices)





**Monterey County Workforce Investment Board**  
*Non-Financial*

**Eligible Training Provider List (ETPL) for CalJOBS  
MASTER AGREEMENT FOR TRAINING SERVICES  
Workforce Investment Act (WIA) Title I  
(Adults & Dislocated Workers)**

The Monterey County Workforce Investment Board, hereinafter referred to as the "Local Workforce Investment Board" or LWIB, and **Hartnell College**, hereinafter referred to as CONTRACTOR, hereby enter into this Agreement to provide Training Services to Workforce Investment Act (WIA) Title I eligible customers referred by the America's Job Center of California (formerly One-Stop Career Center) program providers in Monterey County to the CONTRACTOR. The parties hereby agree:

1. The term of this Master Agreement is from **June 5, 2015** and continues until CONTRACTOR is no longer listed on the Eligible Training Provider List (ETPL) through the CalJOBS website located online at: [www.caljobs.ca.gov](http://www.caljobs.ca.gov), under Education Services.
2. CONTRACTOR must provide training for occupations based on the following Monterey County or State priority industry sectors: Agriculture; Tourism & Hospitality; Education & Research; Health & Social Assistance, Advanced Manufacturing, and Clean Energy. In instances where it can be demonstrated that there is a demand for workers in the field of employment being sought by the WIA eligible participant and that training will result in increased earnings and career pathway opportunities, training may be allowable.
3. Training must result in completion of an industry-recognized credential, national or state certificate, or degree, including all industry appropriate competencies, licensing and/or certification requirements.
4. CONTRACTOR must provide documentation that meets one of the following criteria in order to have their programs listed on the ETPL:
  - Approval to Operate or Verification of Exemption by the Bureau of Private Postsecondary Education (BPPE). This information can be obtained on the BPPE website under the Directory of Approved Institutions: [www.bppe.ca.gov/schools/approved\\_schools.shtml](http://www.bppe.ca.gov/schools/approved_schools.shtml) To claim an exemption to BPPE, (reference Section 94874 of the BPPE Act), CONTRACTOR must apply and receive a "Verification of Exemption" before being listed on the ETPL;
  - Accreditation by the Accrediting Commission for Senior Colleges and Universities, Western Association of Schools and Colleges, or the Accrediting Commission for Community and Junior Colleges, Western Association of Schools and Colleges;
  - Postsecondary institutions eligible under Title IV of the Higher Education Act (HEA) and offering programs leading toward an associate degree, baccalaureate degree, or certificate;
  - Programs that are jointly registered under the National Apprenticeship Act (NAA) with the Department of Labor (DOL) and the California Division of Apprenticeship Standards (CDAS);
  - Approval by the California Department of Education; or
  - Approval by the Chancellor's Office of the California Community Colleges (CCCCO).
5. CONTRACTOR shall comply with performance criteria required by the State of California or other measures established by the LWIB in order to continue listing on the CalJOBS, based on the following criteria:
  - Private Postsecondary Education Providers:
    - a) Programs must meet an Entered Employment (placement) Rate of 70 percent in a training related occupation.
  - Division of Apprenticeship Standards Registered Apprenticeship Programs:
    - a) Programs must meet an Apprenticeship Completion Rate of 70 percent.
  - Community College, CSU and UC Programs:
    - a) Certificate or credential attainment of 70 percent for all program participants; **and**
    - b) Entered employment in training-related occupation of 70 percent for WIA participants only.

- Adult Education Programs:
  - a) Certificate or credential attainment of 70 percent for all program participants; and
  - b) Entered employment in training-related occupation of 70 percent for WIA participants only.

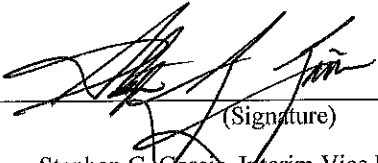
For further details about the performance criteria requirements, reference Employment Development Department (EDD) Directive WSD13-10, "Eligible Training Provider List Policy and Procedures", located online at: [http://www.edd.ca.gov/Jobs\\_and\\_Training/pubs/wsd13-10.pdf](http://www.edd.ca.gov/Jobs_and_Training/pubs/wsd13-10.pdf).

6. CONTRACTOR must provide the LWIB with a copy of its Annual Report to document their achievement of the performance criteria or validate this information through the BPPE website. ([www.bppe.ca.gov/schools/approved\\_schools.shtml](http://www.bppe.ca.gov/schools/approved_schools.shtml)) Those private postsecondary education providers not subject to BPPE oversight (e.g. WASC Junior or Senior Colleges) must provide evidence of their reported outcomes, post them on their website or otherwise make them easily available for public access.
7. CONTRACTOR shall comply with the requirements for ETPL subsequent eligibility established by the State of California in order to continue listing on the ETPL through CalJOBS. Performance for subsequent eligibility shall be verified by the LWIB annually by December 1, utilizing BPPE, CalJOBS, Division of Apprenticeship Standards, California Community College, Adult Education, local board, annual reports, and other appropriate data sources.
8. CONTRACTOR shall register in CalJOBS ([www.caljobs.ca.gov](http://www.caljobs.ca.gov)) and submit a request to the LWIB for approval to list training programs on the ETPL through CalJOBS. Once the registration is approved by the LWIB, CONTRACTOR shall enter all the program information, completing all the required fields, to include performance data. This must occur, prior to a customer being referred to a training program listed on the ETPL through CalJOBS. CONTRACTORS that offer identical programs in multiple local areas should apply to the LWIB in the area where their headquarters are located. (For assistance on how to register, add and update programs in CalJOBS, reference the Provider User & Staff User Guide located online at: [http://www.edd.ca.gov/Jobs\\_and\\_Training/pubs/wsin13-23att.pdf](http://www.edd.ca.gov/Jobs_and_Training/pubs/wsin13-23att.pdf).)
9. CONTRACTOR is responsible for providing updated information and entering performance criteria data for each program listed on the ETPL through CalJOBS. Programs that do not include performance data will not be approved for listing on the ETPL. The LWIB shall use CalJOBS to review and accept new and updated program changes from the CONTRACTOR.
10. CONTRACTOR shall have the right to appeal LWIB or State of California denial for listing on ETPL or de-listing from ETPL using procedures adopted by the State of California for CalJOBS. (Reference EDD Directive WSD13-10, "Eligible Training Provider List Policy and Procedures", located online at: [http://www.edd.ca.gov/Jobs\\_and\\_Training/pubs/wsd13-10.pdf](http://www.edd.ca.gov/Jobs_and_Training/pubs/wsd13-10.pdf))
11. This Master Agreement does not guarantee referrals of customers nor any payments to the CONTRACTOR.
12. The amount reimbursed shall not exceed the amount of the CONTRACTOR published tuition rates offered to the general public for the same course or program and as described on the CalJOBS. Invoicing and payment provisions delineated in the "Agreement for Educational Services" shall apply.
13. CONTRACTOR shall refund the cost of training services in accordance with the terms delineated in the "Agreement for Educational Services".
14. CONTRACTOR shall, in the event of a tuition refund to the LWIB, refund to the LWIB before any refund is made to other granting or contracting agencies.
15. CONTRACTOR shall make available, upon request, information on Federal, State and local financial assistance, including, but not limited to PELL grants, which cover all or part of the tuition and fees, books and supplies or customer support costs relative to the course or program covered by the scholarship. PELL grants or other tuition fund sources must offset funds provided under this Agreement and in no event, in combination with the scholarship, shall exceed the total cost of training services provided under this Agreement.
16. CONTRACTOR shall maintain the confidentiality of all information regarding customers or their immediate families, which may be obtained through applications, forms, interviews, tests, reports from public agencies or counselors, or any other source. Without the permission of LWIB, such information shall be divulged only as

necessary for the performance or evaluation of this Agreement and only to persons having responsibilities under the Agreement.

17. CONTRACTOR may exit any customer from training services, but in such case, CONTRACTOR shall notify LWIB prior to exit or notice of exit, whichever occurs first.
18. LWIB retains the right to observe and monitor the services provided pursuant to this Agreement including, but not limited to, the right to inspect the premises where customers are trained.
19. CONTRACTOR shall maintain such programs and fiscal records and make such program and fiscal reports as required by LWIB. LWIB has the right to verify CONTRACTOR cost and pricing data with respect to the Agreement and examine the CONTRACTOR books, records, or documents pertaining to the Agreement during CONTRACTOR'S regular business hours.
20. CONTRACTOR shall maintain records that are sufficient to support all provider data submissions for CalJOBS purposes and make these records available for monitoring or audit by either the LWIB or the State of California.
21. CONTRACTOR agrees, to the extent permitted by law, to indemnify, defend and save harmless LWIB, it's officers, agents and employees from any and all claims and losses accruing or resulting to any other person, firm or corporation furnishing or supplying work, services, materials or supplies in connection with the performance of this Agreement, and from any and all claims and losses accruing or resulting to any person, firm, or corporation who may be injured or damaged by the CONTRACTOR in the performance of this Agreement.
22. CONTRACTOR and any agents and employees of the CONTRACTOR, in the performance of this Agreement, shall act in an independent capacity and not as officers, employees, or agents of LWIB nor, if CONTRACTOR is not a State institution, as officers, employees, or agents of the State of California.
23. CONTRACTOR shall personally perform all services hereunder and any attempt by the CONTRACTOR to delegate its duties under this Agreement must be in writing, and signed by the parties hereto. To be valid and binding, alterations or variations of the terms of this Agreement must in writing, and signed by the parties hereto. There are no oral understandings or Agreements not incorporated herein.
24. This Agreement may be terminated by either party upon ten (10) days' written notice and by LWIB at such time as the State of California does not make funds available to LWIB for the purpose of carrying out this Agreement.
25. CONTRACTOR shall maintain liability insurance or a self-insurance fund covering injuries to customers incurred while participating in the training program covered by this Agreement. Training conditions shall comply with applicable federal, state or local safety regulations.
26. Prior to reimbursement, the CONTRACTOR shall furnish to LWIB a certificate of insurance, naming the County of Monterey as additional insured, from an insurer admitted to do business in the State of California or equivalent self-insurance. This certificate shall verify that CONTRACTOR carries a comprehensive general liability insurance coverage in the amount of **\$1,000,000** protecting CONTRACTOR and LWIB against claims arising from bodily injury or death to persons occurring on CONTRACTOR business premises or otherwise through CONTRACTOR operation or performance under this Agreement but only in proportion to and to the extent caused by the negligent or intentional acts or omissions of CONTRACTOR, its officers, agents, or employees. The LWIB shall not reimburse the CONTRACTOR unless CONTRACTOR complies with insurance requirements specified in this Agreement.
27. CONTRACTOR shall participate in and be bound by determinations resulting from the LWIB's grievance, complaint, and appeal process.
28. This Agreement shall consist of the following component parts:
  - **Exhibit A – WIA General Assurances**
  - **Exhibit B – Certification Regarding Lobbying**
  - **Exhibit C – Drug-Free Workplace Certification**
  - **Exhibit D – Debarment Certification**

In witness whereof, this Agreement has been executed, by and on behalf of the parties hereto, the day and the year first above written.

FOR COUNTY / LWIB		FOR CONTRACTOR	
			
(Signature)		(Signature)	
<b>Joyce Aldrich, Executive Director Workforce Investment Board</b>		Stephen G. Garcia, Interim Vice President of Administrative Services	
(Name and Title)		(Name and Title)	
<b>730 La Guardia Street</b>		411 Central Avenue	
(Street Address)		(Street Address)	
<b>Salinas, CA 93905</b>		Salinas, CA 93901	
(City, State, ZIP)		(City, State, ZIP)	
<b>(831) 759-6644</b>	<b>(831) 796-3321</b>	<b>(831) 755-6995</b>	<b>(831) 759-6047</b>
(Phone)	(Fax)	(Phone)	(Fax)

# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD  
**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR  
**SUBJECT:** UPDATE ON THE LOCAL WORKFORCE INVESTMENT AREA CLOSE-OUT BUDGET FOR  
PY 2014-15  
**DATE:** AUGUST 5, 2015

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board review and approve the Fiscal Year end close out budget report presented by the Finance Manager.

**INFORMATION:**

WIB staff plan to present an update on the Local Workforce Investment Area's (LWIA) Fiscal Year budget for 2014-15.

**ATTACHMENT:**

FY 2014-15 Close Out Budget handout at meeting

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# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR

**SUBJECT:** REVIEW AND CONSIDER APPROVAL OF RECOMMENDED CONTRACT FOR COMMUNITY ASSET MAPPING & ENVIRONMENTAL SCAN SERVICES SELECTED THROUGH REQUEST FOR QUOTES #2015-01.

**DATE:** AUGUST 5, 2015

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board approve WDB staff's funding recommendation of up to \$25,000 for a Community Asset Mapping and Environmental Scan contract for the period of August 1, 2015 through June 30, 2016.

**BACKGROUND SUMMARY:**

In July 2013, on behalf of the Monterey County Board of Supervisors, the Monterey County EDD/WDB submitted its local five-year strategic plan to the California Workforce Investment Board (CWIB). Within that plan was an identified strategy to develop a survey to assess the workforce needs of business and industry. Since then, the Monterey County EDD/WDB has expressed interest for a needs assessment and opportunity scan of community assets, resources, and programs in the county. As a result, on June 1, 2015 the Monterey County EDD/WDB released a Request for Quote to elicit outside expertise to shape understanding of local and regional opportunities. That understanding will be used to create new service delivery structures throughout the County that adhere to workforce development strategies; to eliminate duplicative services; and to identify resources that better leverage existing services through a braided funding approach.

**DISCUSSION:**

The Request for Quotes released on June 1, 2015 read as follows:

"The Monterey County EDD/WDB currently has a comprehensive America's Job Center of California (Job Center) located in Salinas, California and two satellite Job Centers in Seaside and King City, California. In order to achieve a more sustainable and effective workforce development delivery system, it is imperative to understand where both public and private investments are located within the county and how that investment is responsive to the most pressing labor market needs. The Monterey County EDD/WDB seeks a contractor to:

- Inventory the total scope of workforce development and supportive services assets (exclusive of training providers) operating in Monterey County; and
- Geographically map those assets in relationship to one another; map growth/replacement employment opportunities in identified priority clusters; and map transit options which service growth/replacement employment opportunities.

The ultimate goals of this effort are to enable the Monterey County EDD/WDB (1) to more effectively link, align, and leverage services to businesses and job seeker customers and (2) to help key stakeholders, including business, economic development, education, community-based organizations, and labor, unite around common strategies.”

Four (4) proposals were received by the submission deadline of June 15, 2015. The proposals were then distributed to the staff selection committee for their reading and evaluation. Reference checks for three (3) of the four (4) proposals took place during the weeks of June 29-July 10, 2015. Final reference checks were completed by July 21, 2015. The proposals were re-distributed to the staff selection committee based on the references received to determine if any changes in rating/ranking needed to take place.

### **RANKING OF PROPOSALS:**

For Community Asset Mapping and Environmental Scan services, based upon the responses received and the references checked, the selection committee recommends funding BW Research Partnership to provide an inventory of the total scope of workforce development and supportive services assets operating in Monterey County; and to geographically map those assets in relationship to one another; map growth/replacement employment opportunities in identified priority clusters; and map transit options which service growth/replacement employment opportunities. Of the four proposals received, BW Research is a full service consulting and research firm specializing in workforce and economic research for public entities, including workforce investment boards, economic development agencies, cities, counties and educational institutions. BW Research has provided asset mapping and other services to two of our four county collaborative partners in the past.

BW Research proposes to weave together information from multiple data sources to create an in-depth picture of workforce opportunities. Their approach includes the following elements:

- Quantitative and qualitative data collection, employing both primary and secondary data sources;
- Gathering data and input from relevant service providers and industry leaders;
- Utilization of their knowledge of our local workforce system to complete initial county and area maps that will be user friendly;
- They will produce maps relatively early in the project so the Monterey County team can have the opportunity to provide input and revise as needed;
- Present initial findings and maps to Monterey County staff and get input on developing final deliverables;
- Produce highest quality maps and report to support the planning and decision-making needs of the EDD and WDB;
- Produce user-friendly maps that will inform the WDB's strategic planning process beyond the life of the contract;
- Present final summary of key findings, resources and recommendations that were generated from the project to the Workforce Development Board.

### **FISCAL, PROGRAM ISSUES OR IMPACTS:**

This recommendation allocates Rapid Response Layoff Aversion formula allocation funding to BW Research Partnership for up to \$25,000.

# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR

**SUBJECT:** REVIEW AND DISCUSS CHANGE IN COUNTY POLICY FOR BOARD MEMBER TRAVEL REIMBURSEMENTS

**DATE:** AUGUST 5, 2015

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**INFORMATION:**

At the Board meeting staff will review and discuss changes in County Policy that require all Board members to be placed on county payroll in order to be reimbursed for conference travel.



# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR

**SUBJECT:** REVIEW AND APPROVE WORKFORCE DEVELOPMENT BOARD'S 2013-17 STRATEGIC INITIATIVES AND LOCAL PLAN GOALS FOR PY 2015-16 IN SPECIFIED FORMAT

**DATE:** AUGUST 5, 2015

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**RECOMMENDATION:**

Review and approve the specific strategic initiatives for Program Year 2015-16 based on the WIB's annual retreat held in February, 2015.

**SUMMARY:**

The strategies for 2013-2017 along with the specific strategic initiatives for PY2015-16 in specified format will be presented by staff at the WDB meeting.

**ATTACHMENT:**

- Workforce Development Board Strategic Plan Goals and Strategies handout at meeting

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# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD  
**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR  
**SUBJECT:** DIRECTOR'S REPORT  
**DATE:** AUGUST 5, 2015

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**INFORMATION:**

California's Strategic Workforce Development Plan 2013-2017 – "Shared Strategy for a Shared Prosperity" (Strategic Plan) prioritizes regional coordination among key partners, sector-based employment strategies, skill attainment through earn and learn and other effective training models, and development of career pathways. The State Board is interested in funding applications that further advance the goals of its Strategic Plan and build workforce system infrastructure and capacity through collaboration, innovation, and system change. The Workforce Accelerator Fund 2.0 will support projects that accelerate skill development and employment for individuals with barriers to employment, including the long-term unemployed, low-income workers, disconnected youth, veterans, individuals with disabilities, ex-offenders, parents involved in family reunification, and CalWORKS participants.

Last year the WIB applied for and received Workforce Accelerator 1.0 funds in support of a new program model to serve CalWORKS youth; to reach those young adults to help break the generational cycle of poverty and engage youth in a career path out of poverty. As part of that project, the Youth Ambassador's for Peace Program design was finalized through an application to the Department of Labor Employment and Training Administration for the Workforce Innovation Fund grant program.

The Youth Ambassador's for Peace Program was awarded, however without the ability to pay for youth to receive paid work experience.

*The WAF 2.0 application* is to request the opportunity for a work experience component to the Youth Ambassadors for Peace project with an outcome of increased labor market awareness and career pathway development. Based upon lessons learned through the original project, the desired approach for career planning is through work based learning from mentor work-site supervisors. The requested amount under the proposal will be \$100,000.00 for fiscal year 2015-16. Contract awards are reported to take place in June 2015.

**WDB received word that we were awarded the \$100,000 maximum award amount on June 18 2015.**

The Employment and Training Administration (ETA), U.S. Department of Labor (DOL), announced the availability of approximately \$5 million in grant funds authorized by Section 171 of the Workforce Investment Act (WIA) and Section 212 of the Second Chance Act of 2007 for Linking to Employment Activities Pre-release Specialized Job Center grants.

While state and federal prisons release more than 650,000 people each year, over 9 million people are released from the nation's more than 3,000 county jails, many of whom possess few job skills and little prospect for employment. These jails are located in almost every community in the nation and often in close proximity to local employment services offered by the more than 2,500 Job Centers throughout the country. These jails and Job Centers typically operate in the same communities and under the same local government structure.

This Funding Opportunity Announcement (FOA) provides the opportunity for Local WIBs to develop and operate specialized Job Centers.

Funding for this project: \$500,000 over a 2-year period  
Application due date: April 3, 2015  
# Participants to be served: 350 in Monterey, and 50 in San Luis Obispo County  
Awards announced: July 2015

The purpose of this program is to provide locally incarcerated offenders with employability skills by providing them with workforce services prior to release from local incarceration and linking them to a continuum of employment, training, education, and support services offered through their community-based America's Job Center of California (Job Centers) post-release, as well as building connections to local employers that will enable transitioning offenders to secure employment pre-release.

**WDB received word that we were not funded under this proposal in June 2015.**

Executive Director will provide update from CWA Executive Committee Retreat provided at meeting. Retreat held July 30-31<sup>st</sup> in San Bernardino County.

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# MEMORANDUM

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**TO:** WORKFORCE DEVELOPMENT BOARD

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR

**SUBJECT:** UPDATE FROM CHAIR ON MEETING OF THE MINDS CONFERENCE IN MONTEREY FROM SEPTEMBER 8<sup>TH</sup> TO 10<sup>TH</sup>, 2015

**DATE:** AUGUST 5, 2015

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## **INFORMATION:**

At the Workforce Development Board meeting the Chair will remind members of the opportunity the Meeting of the Minds Conferences holds specifically for board members.

This year's Meeting of the Minds will focus on the new work of the new Boards, and a set of questions that will reveal the opportunities and innovations that will create the desired outcomes of the new legislation.

- What's the WIOA vision and what's really going to be different?
- What does it really mean for every part of the workforce system to become "demand driven?"
- How are local Boards transitioning to smaller Boards?
- How can Boards become even more strategic with their labor force interventions and investments?
- How do we go deeper and get closer to what's really going on inside our sectors?
- How can we connect better with our community partners and convene employers to uncover the issues that matter most to them?
- Which employers are windows to innovative work places that we should engage with and promote?
- How might Boards foster change and create relevancy, responsiveness, and flexibility among our education and training providers?
- What does it mean to be a convener of conveners?

## **The Millennial Mind and the New Economy**

Dr. Ernesto Sirolli, Founder of the Sirolli Institute, and a noted authority in the field of sustainable economic development, will speak on Wednesday afternoon. He has worked in Europe, Africa, Australia, New Zealand, Canada, the U.S.A. and the United Kingdom, and is in demand as a speaker worldwide. Beginning in 1985, he pioneered a unique economic development approach, Enterprise Facilitation©, based on harnessing the passion, determination, intelligence, and resourcefulness of local people.

Ernesto calls the Millennials the "beautiful generation." He says, "The Millennials believe that Good is the only business worth working for! We need the Millennial mind because we have to develop the new technologies to feed, clothe, educate, accommodate, cure and transport 7 Billion people in a sustainable way." Ernesto will be sharing his experiences and ideas on the new approaches we can take as a workforce system to support Millennials in their quest to create the next economy and our new future.

## **SUPER SESSIONS**

On Tuesday afternoon from 3:45 - 5:15, attendees will get to choose from among 3 Super Sessions. The Sessions will focus on:

**Workforce Development Boards** (led by Ron Painter from NAWB);

**Regional Work** (led by Bob Lanter from CWA and Dan Rounds from the CWIB); and

**Partnerships with Education** (led by Sheila Thomas, Vice Chancellor/ Dean of Extended Education for California State University).

## **PRECONFERENCE SESSION ADDED**

A preconference session called, The Executive Edge, will occur on Tuesday morning.

Through a year long program, CWA's Executive Boot Camp is producing leaders that can effectively operate in complex environments, be politically savvy, facilitate collaborative efforts, staff Boards, manage staff and more. This year's Boot Camp graduates will discuss their "capstone projects" and share the results of their deep dive into one of the core skills that provide an "executive edge" to aspiring workforce leaders.

## **CONFERENCE TRACKS**

To enhance your familiarity and add to your skills with one of the big issues in WIOA, you can follow one of our Conference Tracks. Review the current agenda to see all 55 offerings that focus on Board Leadership, Sector Strategies, Service Delivery Redesign, Earn and Learn Models, Partnerships and Collaborations, Career Pathways, Business Engagement and Youth Program Elements

## **Of further note ---**

Good news. CWA has booked Meeting of the Minds through 2019 at the Monterey Marriott Hotel. MMM first premiered in 1998 and will now remain one of the unique workforce leadership and policy conferences through this decade. Meeting of the Minds is always scheduled the three days after Labor Day, so it's easy to remember. The kids go back to school and we go back to work after summer vacation!