



# MONTEREY COUNTY ECONOMIC DEVELOPMENT

MONTEREY COUNTY WORKFORCE INVESTMENT BOARD

ERIK CUSHMAN, WIB CHAIR

## Monterey County Workforce Investment Board (WIB) OVERSIGHT COMMITTEE

Shoreline Workforce Development, 249 10th Street, Marina, CA

Thursday, July 12, 2012

8:30am

### Oversight Committee Members:

Mary Ann Leffel, Chair

Al Davis

Cesar Lara

Judith Profeta

Larry Silva

Teresa Sullivan

Brian Turlington

### AGENDA

<b>CALL TO ORDER / INTRODUCTIONS:</b>	Mary Ann Leffel, Chair
<b>CHANGES TO AGENDA:</b>	
<b>PUBLIC COMMENT:</b>	
<b>CONSENT CALENDAR:</b>	Mary Ann Leffel
C-1. <b>Action:</b> Approve the minutes of the June 14, 2012 Oversight Committee meeting. ( <i>Attachment</i> )	
<b>BUSINESS MEETING CALENDAR:</b>	
1. <b>Information:</b> Update on current and pending, local, State and Federal monitoring of Monterey County's local workforce investment system. ( <i>Attachment</i> )	Joyce Aldrich
2. <b>Information:</b> Update on WIB Policies. ( <i>Attachment</i> )	Marleen Esquerra
3. <b>Information:</b> Receive a report on WIA Title I Adult and Dislocated Worker program providers for PY 2011-12. ( <i>Attachment</i> )	Wil Moore Rosie Chavez Rod Powell
4. <b>Information:</b> Update on the WIA Title I Adult subcontracts with Turning Point of Central CA and Shoreline Workforce Development Services for Program Year 2012-13. ( <i>Attachment</i> )	Marleen Esquerra
5. <b>Information:</b> Report on required Rapid Response activities to private sector employers in Monterey County, including small businesses. ( <i>Attachment</i> )	Joyce Aldrich
6. <b>Information:</b> Update on grants. ( <i>Attachment</i> )	Joyce Aldrich
7. <b>Information:</b> Update on Monterey County's Local Workforce Investment Area (LWIA) budget. ( <i>Attachment</i> )	Joyce Aldrich
8. <b>Information:</b> Discuss the Budget Ad-hoc Workgroup. ( <i>Attachment</i> )	Joyce Aldrich
<b>ANNOUNCEMENTS OF EVENTS:</b>	Mary Ann Leffel
<b>Subcommittee Meetings:</b>	<b>WIB Meetings:</b>
Youth: 9/11/2012 – Shoreline, Marina	8/1/2012 – Marina Library
Oversight: 8/9/2012 – Shoreline, Marina	
Executive: 7/18/2012 – Shoreline, Marina	
<b>ADJOURN:</b>	Mary Ann Leffel
To request information, please contact the Monterey County Workforce Investment Board staff at (831) 796-6434 or visit our website at <a href="http://www.montereycountywib.org">www.montereycountywib.org</a> .	

Monterey County  
Workforce Investment  
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**UNADOPTED**  
**MONTEREY COUNTY Workforce Investment Board**  
**OVERSIGHT COMMITTEE**

June 14, 2012, 8:30AM  
 Shoreline Workforce Development Services, 249 10<sup>th</sup> Street, Marina, CA

**Members Present:** Phoebe Helm, Cesar Lara, Judith Profeta, Larry Silva, Teresa Sullivan and Brian Turlington

**Members Absent:** Al Davis (Excused) and Mary Ann Leffel (Excused)

**Staff Present:** Joyce Aldrich, Marleen Esquerra and Flor Galvan (WIB staff)

**Others Present:** Yuko Duckworth (EDD), Timothy Jones (Turning Point), Wil Moore (Shoreline) and Rod Powell (OET)

**Call to Order/Introductions:** Ms. Profeta called the meeting to order at 8:33am and called for introductions. A quorum was established.

**Changes to Agenda:** None

**Public Comment:** None

**Consent Calendar:**

Mr. Silva requested that item C-3 regarding the approval of the final monitoring reports of Shoreline and Turning Point's Workforce Investment Act (WIA) adult programs for PY 2011-12 be pulled off the consent calendar for further discussion.

**C-3 Action: Approve the final monitoring reports of Shoreline and Turning Point's Workforce Investment Act (WIA) adult programs for PY 2011-12.**

In reference to the observations in the monitoring reports, Mr. Silva inquired about the timeliness of subcontractors issuing claims for reimbursement and if it impacts the contract parameters. Ms. Aldrich stated the subcontractors are required to submit their claims by the 15<sup>th</sup> day of each month for the prior month-end period. She stated it has been a challenge with all subcontractors and discussions have been held where staff stated that they must comply with the contract terms and conditions. All subcontractors agree to adhere to the timeliness of submitting claims.

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

**Second:** Ms. Sullivan

**Motion Passed Unanimously**

**Ms. Profeta requested a motion to approve the consent calendar referencing items C-1 and C-2.**

**C-1 Action: Approve the minutes of the May 10, 2012 Oversight Committee meeting.**

**C-2 Action: Approve the monitoring schedule for Program Year 2012-13.**

**Motion:** Mr. Lara motioned to approve the actions as stated.

**Second:** Ms. Sullivan

**Motion Passed Unanimously**

**Business Meeting Calendar:**

1. **Action: Approve the revised WIB Policy #2011-05 On-the-Job Training.** Ms. Aldrich stated that the WIB recently had an audit completed by the Department of Labor for the NEG-OJT Program. The monitor suggested that we examine our OJT Program Policy to include NEG opportunities where our local area can permit an increase in employer reimbursement for on-the-job training through a sliding scale (between 50% and up to 90%) based on the size of the business. In addition, the State has a waiver in place that provides guidance on this increased flexibility. Mr. Silva requested that a correction be made to section C. Invoicing on page 3 to ensure the reimbursement percentage sliding scale is consistent throughout the policy.

**Motion:** Mr. Lara motioned to accept the action with the invoicing language corrected.

**Second:** Ms. Helm

**Motion Passed Unanimously**

2. **Information: Update on current and pending, local, State and Federal monitoring of Monterey County's local workforce investment system.** Ms. Aldrich stated that Monterey has been involved in several State and federal audits. Our local monitoring has done very well. OET's Adult, Dislocated Worker

and Rapid Response monitoring is currently pending. Ms. Esquerra completed an informal case file review of the NEG Multi-Sector grant. Monterey recently had an audit completed by South Bay WIB and DOL. During the exit interview, the auditor stated that the participant case files look excellent. They were very pleased to see how the assessment, individual training plan and job market analysis were all related. During the 85% WIA Fiscal Procurement monitoring review, the auditor had two findings relating to the recruitment process for the Economic Development Director. WIB staff responded to the draft report and we are awaiting a final response. We are also awaiting a draft report concerning the State review of the CalGRIP grant. As for the review of the NEG Multi-Sector grant, the auditor recommended changes to the Complaint & Grievance WIB policy to remove the "right to participate in program" language in attachment A. The auditor stated that WIA is not an entitlement program and encouraged us to remove this language.

3. **Information: Receive a report on WIA Title I Adult and Dislocated Worker program providers for PY 2011-12.** Ms. Esquerra provided an update on the WIA Adult and Dislocated Worker program providers and referenced the side-by-side comparison matrix which provides the total amount allocated to each provider, the average cost per participant, enrollment numbers and summary of activities and services. Shoreline and Turning Point's cost per participant is much higher because they serve fewer enrollments and provide more training. OET is less as they serve more participants which spread the costs across core, intensive and training services. For program year 2011-12, the number of total enrollments served is 553. Of that amount, the number of total core services provided was 3,719 with an average of 6.5 services received per participant. The total number of intensive services provided was 1,808 with an average of 4 services received per participant. The total number of training services provided was 111 with an average of .4 received per participant.
4. **Information: Update on grants.** Ms. Aldrich provided an update on current grant submissions. The WIB received verbal approval of funding for the Governor's 25% Discretionary Additional Assistance Dislocated Worker Funds for the amount of \$999,847 to serve mass layoffs of workers in the manufacturing and banking industries to include Capital One workers. She stated the Veteran's Employment Related Assistance Program grant proposal was not funded.
5. **Information: Discuss Monterey County's Dislocated Worker strategy including:**  
Ms. Aldrich reported on Monterey County's Dislocated Worker strategy. She stated that plans are underway to submit a new National Emergency Grant to provide on-the-job training opportunities to local displaced workers to include River Ranch, Capital One and Fresh Express. She received confirmation that Monterey County was awarded the Dislocated Worker Additional Assistance Funding for \$999,847 to serve displaced workers in the manufacturing and banking industries. She plans to contact the State to see if its possible to rollover the current year Rapid Response funding into the subsequent year. She provided an update on training provided to the Rapid Response Team. She also presented a brief job analysis overview of the local area.
6. **Information: Update on Monterey County's local workforce investment area (LWIA) budget.** Ms. Aldrich stated that WIB staff received the most recent budget information from DSES/OET's fiscal unit for today's meeting. She presented the budget challenges in the area of the adult funding stream which far exceeded the planned goal. OET's fiscal office is determining how they are doing business and how to move participants to other allocations where they have remaining funding. At present, OET is making progress. Together, WIB and OET staff are pulling together a plan to transition the admin of workforce investment services into economic development. One of the proposed strategies is to move the fiscal and MIS units under the new Economic Development Department to work together with the WIB. This proposes a significant change involving OET.

**ADJOURN:** Ms. Profeta motioned to adjourn the meeting at 10:04am.

**Motion:** Mr. Silva motioned to accept the motion as stated.

**Second:** Mr. Turlington

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE

**FROM:** JOYCE ALDRICH, WIB CONSULTANT

**SUBJECT:** UPDATE ON CURRENT AND PENDING LOCAL, STATE AND FEDERAL MONITORING OF MONTEREY COUNTY'S LOCAL WORKFORCE INVESTMENT SYSTEM

**DATE:** JULY 12, 2012

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**INFORMATION/SUMMARY:** Local, state and federal monitoring reviews occur at least once a year or as needed to ensure sub recipients are in compliance with the provisions of WIA, associated state and federal regulations and directives, local policies, and contract requirements.

During program year 2011-12, Monterey County has been involved in a series of twelve monitoring reviews on a local, state and federal level. As a result of these reviews, the monitors recommended that WIB staff revise three of its local policies that concern on-the-job training, complaint & grievance and adult programs. WIB staff is convening a local policy workgroup to meet and address these changes.

The most recent monitoring review was done by the Department of Labor on June 11-12, 2012 of the National Emergency Grant – On-the-Job Training grant. There are no issues reported on this review to date. The monitor is currently following up with employers and program participants.

The following is a list of all current and pending local, state and federal monitoring activities of Monterey County's local workforce investment system:

### Local Monterey County Workforce Investment Board – Annual Monitoring:

Program	Dates of Monitoring	Status	Draft/Final Reports
1. Turning Point – WIA Adult	2/21–22, 2012	No findings.	Draft - 5/1/2012 Final - 6/8/2012
2. Shoreline – WIA Adult	2/27–28, 2012	No findings.	Draft - 5/1/2012 Final - 6/8/2012
3. Shoreline – National Emergency Grant (NEG) – On-the-Job Training (OJT)	3/22–23, 2012	No findings.	Draft - 5/18/2012 Final – 6/8/2012
4. Office for Employment Training (OET)– National Emergency Grant (NEG) – On-the-Job Training (OJT)	3/22–23, 2012	No findings.	Draft - 5/18/2012 Final – 6/8/2012
5. OET - WIA Adult, Dislocated Worker and Rapid Response	4/9–13, 2012	Pending	Pending
6. OET – NEG Multi-Sector	6/4/2012	Informal review done by WIB staff.	6/4 - Initial case file review provided to OET.

### State of CA Employment Dev. Dept. Compliance Review Division (CRD) – Annual Monitoring:

Program	Dates of Monitoring	Status	Draft/Final Reports
1. WIA 85% Fiscal & Procurement (All Programs)	March 5–9, 2012	Two findings related to the recruitment of the Economic/WIB Executive Dir. and the dollars that were allocated out of WIA.	Draft report received 4/11/2012. WIB responded 5/14/2012.
2. WIA 85% Program (Adult and Dislocated Worker Programs)	Sep–Oct, 2012	TBD	TBD

**State of CA Employment Dev. Dept. Audit & Evaluation Division (A&ED) – Special Grants:**

<b>Program</b>	<b>Dates of Monitoring</b>	<b>Status</b>	<b>Draft/Final Reports</b>
1. Governor's Gang Reduction, Intervention and Prevention (CalGRIP), Layoff Aversion and Conflict of Interest	March 26–30, 2012	Audit was done due to two incident reports involving participant WIA eligibility, contract procurement, and possible conflicts of interest involving a MCWIB member.	Pending draft report due in June 2012.

**US Department of Labor (DOL) – Special Grants:**

<b>Program</b>	<b>Dates of Monitoring</b>	<b>Status</b>	<b>Draft/Final Reports</b>
1. DOL National Emergency Grant – On-the-Job Training (OJT)	April 20, 2012	No report was received to date, however verbal observation at the exit interview indicated a change was needed to the local WIB OJT Policy that includes general language for the purpose of National Emergency OJT Grants.	60-90 Days
2. DOL National Emergency Grant – Multi-Sector	June 6-7, 2012	No report was received to date, however verbal observation at the exit interview indicated changes needed to be made to the WIB Complaint & Grievance policy and the WIB Adult Program policy. Staff is working on compiling additional fiscal information requested by the monitor for further examination.	60-90 Days
3. NEG-OJT OIG Audit	June 11-12, 2012	No issues to date. Monitor is currently following up with employers and program participants.	60-90 Days

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE  
**FROM:** JOYCE ALDRICH, WIB CONSULTANT  
**SUBJECT:** UPDATE ON WIB POLICIES  
**DATE:** JULY 12, 2012

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**INFORMATION:**

WIB staff plan to reconvene a policy workgroup to review and update existing WIB policies. The purpose of this workgroup is to convene all affected parties to reexamine existing policies for relevance, determine if policies need to be rescinded and/or updated and to revise existing policies to conform with recommendations made during the recent federal and State monitoring reviews.

In the past, WIB staff convened several policy workgroup meetings with local WIA Youth, Adult and Dislocated Worker program operators, which resulted in the development of the attached DRAFT matrix of active and pending WIB policies. The matrix has since been updated to include the following proposed changes for review and discussion by the policy workgroup:

1. New **#2012-04 – Rapid Response Process and Procedures Policy** - Provides information and guidance to Monterey County program operators on the WIB policies and procedures concerning WIA Rapid Response program and services.
2. New **#2012-03 – Dislocated Worker Local WIB Definition Criteria Policy** – Provides local WIB definition of the Dislocated Worker program.
3. New **#2012-02 – Serious Barriers to Employment Policy** – Provides local definition of youth who face serious barriers to employment if he or she requires additional assistance to complete an educational program or to secure and hold employment.
4. Revision to the existing local **#2011-05 – On-the-Job Training (OJT) Policy** – Provides guidance and criteria on the DOL waiver which permits an increase in employer reimbursement for on-the-job training through a sliding scale (between 50% and up to 90%) based on the size of the business.
5. Revision to the existing local **#2005-10 – Grievance and Complaint Procedures Policy** – Provides updates to language in Attachment A and contact information.

The matrix will be used as a project tool for planning purposes during the policy workgroup meetings and referenced during routine monitoring reviews conducted by WIB staff.

All draft policies will be brought to the Oversight Committee and/or Youth Council for review and approval prior to adoption by the full WIB.

**ATTACHMENTS:** DRAFT matrix of active and pending WIB policies.

**DRAFT List of Active Pending WIB Policies**  
As of July 5, 2012

Policy Number	Name of Policy	Purpose of Policy (Also includes comments)	Resources for Monitoring Review	Critical Dates	Aligns with WIB strategic plan (Regulatory & Strategic)	WIB Approved	Publicly Notified & Distributed
2012-04 - <b>NEW</b>	Rapid Response Process and Procedures	Provide information and guidance to Monterey County program operators on the WIB policies and procedures concerning WIA Rapid Response program and services.	Reference Rapid Response 121 Forms	121 forms reviewed quarterly; Program operators monitored annually.		<b>TBD</b>	<b>TBD</b>
2012-03 - <b>NEW</b>	Local WIB definition of Dislocated Worker Eligibility Criteria: <i>supersedes the following 6 WIB policies: 1) #2003-09 - Unlikely to Return Policy; 2) #2003-08 - Sufficient to Demonstrate Attachment to the Workforce Policy; 3) #2003-07 - Substantial Layoff Policy; 4) #2003-06 - Difficulty Obtaining or Upgrading Employment for Displaced Homemakers Policy; 5) #2003-05 - General Economic Conditions Policy, and 6) #2003-04 - General Announcement of Plant Closing Policy</i>	Provides local WIB definition of the Dislocated Worker program.	Reference VOS case files and notes, supplemental docs.	Reviewed annually.		<b>TBD</b>	<b>TBD</b>
2012-02 - <b>NEW</b>	Serious Barriers to Employment: <i>supersedes #2003-11 - WIB Policy Local WIB Definition of an Individual who Requires Additional Assistance to Complete an Educational Program or Local WIB Definition of Serious Barriers to Employment</i>	The purpose of this policy is to communicate local guidance regarding the Monterey County Workforce Investment Board's definition of "youth who face serious barriers to employment", if he or she requires additional assistance to complete an educational program or to secure and hold employment, due to barriers described in this policy.	Reference VOS case files and notes, supplemental docs.	Reviewed annually.		<b>TBD</b>	<b>TBD</b>
2012-01	Letters of Support and Commitment	The purpose is to establish the Monterey County WIB's policy on Letter's of Support and Commitment.	Observe and evaluate WIB practices.	Reviewed annually.		6/6/2012	7/3/2012
2011-05 - <b>REVISED</b>	On-the-Job Training (OJT)	The purpose of this policy is to provide guidance and criteria used in the development of and the administration of On-the-Job Training (OJT) contracts in compliance with the DOL waiver granted to California under WIA Section 101(31)(B) which permits an increase in employer reimbursement for on-the-job training through a sliding scale (between 50% and up to 90%) based on the size of the business.	Reference VOS case files and notes, supplemental docs.	Reviewed annually.		8/3/2011; revised WIB approved 12/7/2011; <b>Pending WIB approval on 8/1/2012</b>	8/3/2011
2011-04	Individual Training Accounts	The purpose of this policy is to provide guidelines for implementing ITAs that is flexible and maximizes informed customer choice in selecting an eligible training provider. This policy sets the training limit amount to \$5,000 (as funds are available) and duration of ITAs developed up to 12 months for eligible individuals funded under the Workforce Investment Act (WIA) within Monterey County.	Reference VOS case files and notes, supplemental docs.	Reviewed annually.		6/1/2011	6/15/2011
2011-03	Tiered Service Levels – Core, Intensive and Training Services	This policy provides additional clarity and guidance to assist WIA funded adult and dislocated worker clients through a tiered approach of three service levels under the provisions of the WIA for customers needing Core, Intensive and Training Services and which of those services require registration/enrollment into WIA and determination of income eligibility. The tiered service level does not apply to youth.	Reference VOS case files and notes, supplemental docs.	Reviewed annually.		EC Approved 1/19/2011 and WIB Approved 4/6/2011	1/27/2011
2011-02	Definition of Priority of Service and Economic Self-Sufficiency	This policy defines "priority of service" for the use of WIA Title I Adult funds for training services. It also defines "self-sufficiency" as it applies to Monterey County WIA Title I Adult and Dislocated Worker programs. Service providers will use this policy to determine if employed adults and dislocated workers are eligible for, and in need of training or retraining services to obtain or retain employment that allows for self-sufficiency.	Reference VOS case files and notes, supplemental docs.	Reviewed annually.		EC Approved 1/19/2011 and WIB Approved 4/6/2011	1/27/2011

**DRAFT List of Active Pending WIB Policies**  
As of July 5, 2012

Policy Number	Name of Policy	Purpose of Policy (Also includes comments)	Resources for Monitoring Review	Critical Dates	Aligns with WIB strategic plan (Regulatory & Strategic)	WIB Approved	Publicly Notified & Distributed
2011-01	Lower Living Standard Income Level (LLSIL) and Poverty Guidelines; 6/19/2012 - updated and posted 2012 LLSIL Income Levels	Purpose is to provide the annual update of the LLSIL and Poverty Guidelines used to establish low-income status for WIA Title I programs to determine income eligibility for youth, income eligibility for employed adults for certain services, self-ufficiency, and eligibility for the Work Opportunity Tax Credit. Please Note: Required updates to the LLSIL chart attached to the policy will be done annually and automatically. Review acceptable eligibility documentation and verification procedures.	Reference policy for income guidelines for youth and adults. Reference VOS case files and notes, supplemental docs.	Updated annually & automatically		EC Approved 1/19/2011 and WIB Approved 4/6/2011	1/27/2011, Auto Notified on 7/3/2012
2010-02	WIB Definition of Adult and Dislocated Worker Eligibility Documentation and Verification	Review acceptable eligibility documentation and verification procedures.	Reference policy for list of data elements to review.	Reviewed annually.		5/5/2010	5/27/2010
2010-01	Monterey County WIA Geographic Service Goals	Review service to WIA eligible youth and adults by Geographic Area. Min. goal is 10%. Target goals: North 11%, Central 55%, West 16%, and South 18%.	Reference reports from MIS and fiscal, VOS registered applicants by zip code.	Reviewed annually.		1/6/2010	1/19/2010
2009-01	Superseded by Policy #2011-01	n/a				10/21/2009	1/19/2010
2008-05	Superseded by Policy #2009-01	n/a				8/18/2008	8/18/2008
2008-04	Youth Eligibility Documentation and Verification	Review acceptable eligibility documentation and verification procedures.	Reference policy for list of data elements to review.	Reviewed annually.		8/6/2008	8/7/2008
2008-03	Superseded by Policy #2010-02	n/a				8/6/2008	8/7/2008
2008-02	Superseded by Policy #2011-02	n/a				8/6/2008	8/7/2008
2008-01	Superseded by Policy #2011-03	n/a				8/6/2008	8/7/2008
2007-08	Financial Reporting Policy for WIA Subrecipients	Effective July 1, 2007, all subrecipients are required to use the accrual basis of accounting and submit a summary of WIA expenditure reports to the Monterey County Office for Employment Training's Fiscal Office on a monthly basis. Information on the definition and use of a certificate and the exclusion of a credential under the Department of Labor Common Measures.	Observe and evaluate WIB practices.	Reviewed annually.		12/5/2007	12/11/2007
2007-06	Certificate and Credential Definition and Policy	Information on the definition and use of a certificate and the exclusion of a credential under the Department of Labor Common Measures.	Reference policy for acceptable docs. Reference VOS case files and notes, supplemental docs.	Reviewed annually.		10/3/2007	11/6/2007
2007-05	Ethics Training Policy for WIB and Youth Council Members	On October 7, 2005, the Governor signed Assembly Bill No. 1234, which requires ethics training to all local agency officials. This policy identifies the scope of training needed to successfully complete the ethics training requirement for all active MCWIB and Youth Council members. MCWIB and its subrecipients that award WIA funds to lower-tier subrecipients must have written audit resolution policies and procedures that, at a minimum, follow the guidelines described in this policy.	Observe and evaluate WIB practices.	Reviewed annually and every 2 years.		10/3/2007	11/6/2007
2007-04	Audit Resolution Policy	MCWIB and its subrecipients that award WIA funds to lower-tier subrecipients must have written audit resolution policies and procedures that, at a minimum, follow the guidelines described in this policy.	Observe and evaluate practices.	Reviewed annually.		12/5/2007	12/11/2007
2007-02	Accessibility Policy for Individuals with Disabilities	This policy requires that all program providers and subrecipients expending WIA Title I funds shall comply with the WIA and Americans with Disabilities Act to offer a full array of services and coordinate a system of referrals to effectively serve people with disabilities who are ready to secure training or unsubsidized employment.	Reference reports from MIS and fiscal, VOS registered applicants by demographics.	Reviewed annually.		6/6/2007	6/6/2007
2007-01	Adult Employment/Credential Performance Measure for On-the-Job Training	Beginning July 1, 2006, certificates must now be issued by specific recognized awarding institutions as noted on the attachment to this policy.	Reference reports from MIS on performance, JTA system.	Reviewed annually.		4/4/2007	4/4/2007
2006-01	Veteran's Priority of Service	Procedures that ensure that eligible veteran workers are given priority over nonveterans for all available services; and evidence or plan that ensures WIA Adult and Dislocated Workers Program outreach efforts, written materials on available services and Web sites express and implement a priority of service to veterans.	Observe and evaluate practices.	Reviewed annually.		07/01/06	07/01/06



**DRAFT List of Active Pending WIB Policies**  
As of July 5, 2012

Policy Number	Name of Policy	Purpose of Policy (Also includes comments)	Resources for Monitoring Review	Critical Dates	Aligns with WIB strategic plan (Regulatory & Strategic)	WIB Approved	Publicly Notified & Distributed
2005-11	Mileage Reimbursement Policy for Youth Members of the Monterey County WIB Youth Council	The purpose of this policy is to establish uniform travel rules and claiming procedures for active youth members of the County of Monterey WIB Youth Council authorized to travel to and from Youth Council meetings and special youth events.	Observe and evaluate WIB practices.	Reviewed annually.		2/1/2006	02/01/06
2005-10 - REVISED	Grievance and Complaint Procedures - <b>Pending change to remove the "right to participate in program" language in attachment A. Also update contact info.</b>	Title 20 Code of Federal Regulations (CFR) Section 667.600 requires the Monterey County WIB under Title I of WIA, establish and maintain a procedure for receiving and acting upon complaints from clients or other interested parties affected by the local workforce investment system, including One-Stop partners and providers of services.	Observe and evaluate WIB practices.	Reviewed annually.		6/7/2005	6/7/2005
2005-09	Local Workforce Investment Area (LWIA) Selective Service Registration Policy - REVISED	The purpose of this policy is to provide guidance regarding Selective Service registration requirements for participation in Workforce Investment Act (WIA) funded services. Additionally, this policy contains model questions to LWIA staff determine whether failure to register by a current or potential WIA participant was knowing and willful. To be revised.	Reference proof of registration in case file, supplemental docs.	Reviewed annually.		2/1/2006; Revision WIB approved 6/6/2012	2/1/2006; Revision noticed 7/3/2012
2005-08	Industry Clusters		Reference reports. Observe and evaluate practices.	Reviewed monthly.		12/7/2005	12/7/2005
2005-07	Limited English Proficiency	Does the WIA Title I subrecipient have a Plan that addresses the five elements? In addition to the five elements, does the plan include clear goals, management accountability, and opportunities for community input and planning?	Request copy of LEP Plan. Sample for Plan implementation – Question in Participant Interviews, Mystery Shopper Report	Reviewed annually.		6/7/2005	6/7/2005
2005-06	Superseded by Policy #2010-01	n/a				6/7/2005	6/7/2005
2005-05	WIB Supportive Services Policy	Program operators authorized by the WIB to use WIA Title I funds for support services must develop a written policy addressing the requirements of this policy.	Request copy of support services policy from all providers. Sample for implementation.	Reviewed annually.		6/7/2005	6/7/2005
2005-04	WIB Adult and Youth Service Strategy Goals Policy	WIA Title I adult and youth service providers must meet the goals identified in this policy for all new enrollments. Participant percentage goals are set for Homeless, Out-of School, Offender, Disabled, TANF, Foster Care, Veterans, Older Workers, High School Dropouts, and Limited English demographic characteristics.	Reports from MIS and Fiscal.	Reviewed annually.		6/7/2005	6/7/2005
2005-03	WIB Protocol and Procedures Policy	This policy provides protocol for WIB and subcommittee meetings, and procedures for staffing and internal operations	Observe and evaluate WIB practices.	Reviewed annually.		3/8/2005	3/8/2005
2005-02	WIB Conference and Training Policy	This policy identifies the scope of training and the amount of funds required to successfully implement a conference and training program for WIB members. Training is required so that WIB members can perform their regulatory due diligence, comply with the WIB bylaws, and be advocates for legislative issues.	Observe and evaluate WIB practices.	Reviewed annually.		3/8/2005	3/8/2005
2005-01	Superseded by Policy #2011-02	n/a				2/1/2005	2/1/2005
2004-03	Incident Reporting Policy	WIB ED contact info was updated. All affected parties were notified on Jan 26, 2011. This policy provides procedures for reporting incidents, including but not limited to criminal fraud, criminal abuse or other criminal activity and non-criminal complaints, such as waste of funds, to the Compliance Review Division (CRD) of the Employment Development Department (EDD) and the Department of Labor's (DOL) Office of Inspector General (OIG).	Review Incident Reporting Log and open and closed items.	Reviewed annually.		6/1/2004	1/26/2011
2004-02	Recovery of WIA Title I Tuition and Training Refunds Policy	Program operators in receipt of WIA funds must produce and maintain a written policy/procedure to ensure the recovery of unused WIA tuition monies.	Reports from MIS and Fiscal.	Reviewed annually.		12/7/2004	12/7/2004

**DRAFT List of Active Pending WIB Policies**  
As of July 5, 2012

Policy Number	Name of Policy	Purpose of Policy (Also includes comments)	Resources for Monitoring Review	Critical Dates	Aligns with WIB strategic plan (Regulatory & Strategic)	WIB Approved	Publicly Noticed & Distributed
2004-01	Superseded by Policies #2008-2 and #2008-5	n/a				10/5/2004	10/5/2004
2003-16	Superseded by Policy #2010-02	n/a				6/1/2004	6/1/2004
2003-15	Local WIB Definition of Local Dependency Policy	Add to existing youth policy 2008-04?				6/1/2004	6/1/2004
2003-14	Superseded by Policy #2005-9	n/a				6/1/2004	6/1/2004
2003-13	Superseded by Policy #2010-02	n/a				6/1/2004	6/1/2004
2003-12	Local WIB Definition of Time Limitations for Application Process	To be revised.				6/1/2004	6/1/2004
2003-11	Local WIB Definition of an Individual who Requires Additional Assistance to Complete an Educational Program or Local WIB Definition of Serious Barriers to Employment	Add to existing youth policy 2008-04? See additional barriers to employment.				6/1/2004	6/1/2004
2003-10	Superseded by Policy #2004-1	n/a				6/1/2004	6/1/2004
2003-09	Unlikely to Return Policy	Create DW local definitions policy.				6/1/2004	6/1/2004
2003-08	Sufficient to Demonstrate Attachment to the Workforce Policy	Create DW local definitions policy.				6/1/2004	6/1/2004
2003-07	Substantial Layoff Policy	Create DW local definitions policy.				6/1/2004	6/1/2004
2003-06	Difficulty Obtaining or Upgrading Employment for Displaced Homemakers Policy	Create DW local definitions policy.				6/1/2004	6/1/2004
2003-05	General Economic Conditions Policy	Create DW local definitions policy.				6/1/2004	6/1/2004
2003-04	General Announcement of Plant Closing Policy	Create DW local definitions policy.				6/1/2004	6/1/2004
2003-03	Local WIB definition of Deficient in Basic Literacy Skills Policy	Add to existing youth policy 2008-04?				6/1/2004	6/1/2004
2003-02	Superseded by Policy #2011-03	n/a				6/1/2004	6/1/2004
2003-01	Superseded by Policy #2008-01	n/a				6/1/2004	6/1/2004
N/A	Superseded by Policy #2011-04	n/a				6/29/2000	6/29/2000

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE  
**FROM:** MARLEEN ESQUERRA, WIB ANALYST  
**SUBJECT:** RECEIVE A REPORT ON WIA TITLE I ADULT AND DISLOCATED  
WORKER PROGRAM PROVIDERS FOR PY 2011-12  
**DATE:** JULY 12, 2012

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**INFORMATION/SUMMARY:**

This report provides a side-by-side performance and expenditure summary for all Monterey County WIA Title I Adult and Dislocated Worker program operators.

At the Oversight Committee meeting, representatives from each agency plan to provide handouts and verbal updates on their respective programs.

**ATTACHMENT:** Side-by-side performance and expenditure summary.

**WIA Adult Participants, by Program Operator - Program Year 2011-12**

As of July 5, 2012

**ADULT  
OET**

**Shoreline  
Turning Point  
Entire System**

PCR for	G: 201   A: 001   Geo: A   D: 07/01/2011 - 06/30/2012				
	<b>Budget Summary</b>				
	Average Costs per Enrollment (Includes Core, Intensive, Training & Supportive Svcs)	\$ 1,059,208	\$ 327,600	\$ 302,400	\$ 1,689,208
	Average Costs per Participant Exit (Includes All Services & Follow-up)	\$ 2,429	\$ 3,809	\$ 4,142	\$ 2,839
		\$ 4,413	\$ 4,748	\$ 6,048	\$ 4,705
<b>I.</b>	<b>Participant Summary</b>	<b>Total</b>	<b>Total</b>	<b>Total</b>	<b>Total</b>
	A. Participant Count				
	1 Carried In	99	0	0	99
	2 New Enrollments During Report Period	337	86	73	496
	<b>3 Total Enrollments</b>	<b>436</b>	<b>86</b>	<b>73</b>	<b>595</b>
	4 Participant Exits During Report Period	240	69	50	359
		<b>Current</b>	<b>Current</b>	<b>Current</b>	<b>Current</b>
<b>D.</b>	<b>Total Participant Exits</b>	<b>240</b>	<b>69</b>	<b>50</b>	<b>359</b>
	1 Entered Unsubsidized Employment	57	59	42	158
	1a. Training Related Employment	6	38	30	74

**DISLOCATED WKR  
OET**

	\$ 1,926,743
	\$ 4,654
	\$ 8,718
	<b>Total</b>
	126
	288
	<b>414</b>
	221
	<b>Current</b>
	<b>221</b>
	54
	10

		# of Services Received	# of Services Received	# of Services Received	# of Services Received
<b>II.</b>	<b>TOTAL Program Activities/Services Summary (during report period only)</b>				
	A. Core Services	3039	248	692	3979
	B. Intensive Services	1222	145	520	1887
	C. Supportive Services (incl. Youth Supp. Svcs.)	169	74	61	304
	D. Training Services	31	40	42	113

	# of Services Received	3484
		1152
		122
		15

		# Exited	# Exited	# Exited	# of Services Received
<b>II.</b>	<b>TOTAL Program Activities/Services EXITED Summary (during report period only)</b>				
	A. Core Services	1245	205	476	1926
	B. Intensive Services	453	120	397	970
	C. Supportive Services (incl. Youth Supp. Svcs.)	36	63	52	151
	D. Training Services	5	36	34	75

	# of Services Received	1183
		436
		38
		4

		Avg # of Services Received	Avg # of Services Received	Avg # of Services Received	Avg # of Services Received
<b>III.</b>	<b>AVERAGE Program Activities/Services Summary (during report period only)</b>				
	A. Core Services	7	2.9	9.5	6.5
	B. Intensive Services	2.8	1.7	7.1	3.9
	C. Supportive Services (incl. Youth Supp. Svcs.)	0.4	0.9	0.8	0.7
	D. Training Services	0.1	0.5	0.6	0.4

	Avg # of Services Received	8.4
		2.8
		0.3
		0.0

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE

**FROM:** MARLEEN ESQUERRA, WIB ANALYST

**SUBJECT:** UPDATE ON THE WIA TITLE I ADULT SUBCONTRACTS WITH TURNING POINT OF CENTRAL CA AND SHORELINE WORKFORCE DEVELOPMENT SERVICES FOR PROGRAM YEAR 2012-13

**DATE:** JULY 12, 2012

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**INFORMATION/SUMMARY:**

On August 30, 2011, Shoreline and Turning Point were each awarded a contract for WIA Title I Adult services by the Board of Supervisors in the amount of \$630,000 for the period of July 1, 2011 to June 30, 2012.

The Request for Proposal (RFP) that was issued resulting in these contracts sought responsive bids from qualified organizations to prepare eligible adults for participation in the labor force through the utilization of training contracts. In addition, the contracts were developed in response to recommendations embodied in a system-wide needs analysis completed by the WIB to enhance eligible participants access to services beyond the comprehensive One-Stop Career Center, particularly serving those of underserved target populations in hard-to-serve areas of Monterey County, who do not access or have trouble getting to the Comprehensive One-Stop Career Center.

Services are targeted to WIA eligible, Monterey County adults (18 years of age and older) who face multiple barriers to employment, are low-income based on the Lower Living Standard Income Level (LLSIL) guidelines established by the Monterey County WIB, and are included in one or more of the following categories: veterans and their eligible spouses, disabled individuals, homeless, offenders, and high school drop outs.

The WIB recommended a second one-year extension of each subcontract, starting July 1, 2012. The amount recommended represents a 10% reduction from the previous contract year allocation for a total contract allocation of \$567,000 for PY 2012-13 with a requirement that each subcontractor must expend a minimum of 25% of their contract funds on training per Senate Bill 734. Ten percent (10%) of the minimum training expenditure requirement may be met by applying leveraged resources used for training services. Leveraged resources may include match funds from employers including the employer paid portion of on-the-job training and customized training.

On June 26, 2012, the Monterey County Board of Supervisors approved the WIB's recommendation to approve the subcontracts to start on July 1, 2012.

The funding for each subcontractor and the number of adults to be served is reflected in the chart below:

Adult Subcontractors	Net Contract Recommended	# of enrollments
Shoreline	\$294,840	69
Turning Point	\$272,160	63
<b>Total</b>	<b>\$567,000</b>	<b>132</b>

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE  
**FROM:** JOYCE ALDRICH, WIB CONSULTANT  
**SUBJECT:** REPORT ON REQUIRED RAPID RESPONSE ACTIVITIES TO  
PRIVATE SECTOR EMPLOYERS IN MONTEREY COUNTY,  
INCLUDING SMALL BUSINESSES  
**DATE:** JULY 12, 2012

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**INFORMATION/SUMMARY:**

At the Oversight Committee meeting scheduled on July 12, 2012, WIB staff will present an update on the most recent Rapid Response activities provided to private sector employers in Monterey County, including small businesses.

**ATTACHMENT:** Reference Rapid Response Activity Report handout at meeting.

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE  
**FROM:** JOYCE ALDRICH, WIB CONSULTANT  
**SUBJECT:** UPDATE ON GRANTS  
**DATE:** JULY 12, 2012

**INFORMATION:** Provided below is an update on Monterey County WIB's grant proposals:

## PROPOSALS SUBMITTED & GRANTED

Source	Amount	Title	Term	Purpose	Partner/Role	Notes
Governor's 25% Discretionary Additional Assistance Dislocated Worker Funds (submitted 4/17/2012)	\$999,847	Additional Assistance for Manufacturing & Banking Dislocated Workers	12 months: June 2012 to June 2013	Serve 185 displaced workers driven by multiple layoffs of individuals seeking services from the Monterey County One-Stop delivery system.	OET and Shoreline to develop on-the-job training opportunities and individual training accounts, outreach, career path assessments, case management, counseling, and placement services.	Proposal funded.

## GRANTS CONCLUDING

Source	Amount	Title	Term	Purpose	Partner/Role	Notes
U.S. Department of Labor, Employment & Training Administration	\$444,385 (40% of the total grant award)	National Emergency Grant – Multi Sector Re-employment grant funds	March 18, 2011 to March 17, 2013	Provide re-employment services to workers affected by layoffs from mass layoffs located in 20 CA counties. This project involves a CA Multi Sector workforce partnership consisting of 21 local WIBs. Monterey County WIB is one of 21 WIB's awarded.	For Monterey County, the project area aims to serve 141 affected laid-off workers with employment, training, job search and job placement services provided through a combination of Monterey County One Stop Career Center providers and contractors with demonstrated experience to provide re-employment training and job search and placement services.	Enrollment deadline is June 30, 2012.
ARRA On-the-Job Training National Emergency Grant (NEG)	\$369,988	ARRA On-the-Job Training National Emergency Grant (NEG)	July 1, 2010 to June 30, 2012	The purpose of a regional design is to create a borderless delivery system that optimizes county resources and employer networks to reach and serve long term dislocated workers without geographic restrictions.	This project involves a three-county WIB collaboration consisting of Santa Cruz, Monterey, and San Luis Obispo Counties to serve employers with On-the-Job Training (OJT) contracts. Placement services will be provided through a combination of One Stop providers and a contractor with the demonstrated ability to provide regional placement services.	Grant expired.

**PROPOSALS SUBMITTED & NOT GRANTED**

Source	Amount	Title	Term	Purpose	Partner/Role	Notes
U.S. Department of Labor, Employment & Training Administration	\$5 million	Workforce Innovation Fund Grant Proposal focusing on training in senior healthcare in the amount of \$5 million over a 40-month period	40-month period	Focus of the proposal is to innovate the workforce system & retool service delivery strategies through healthcare career pathways & preparing workers to enter & advance in the healthcare industry, specifically in the geriatric fields supporting the aging population.	WIB and the Department of Economic Development, in collaboration with the Office for Employment Training, Monterey Bay Geriatric Resource Center (MBayGRC) and a coalition of partners.	Not funded.

**PROPOSALS IN PREPARATION**

Source	Amount	Title	Term	Purpose	Partner/Role	Notes
U.S. Department of Labor, Employment & Training Administration	\$1,072,000	National Emergency Grant – Multi-Sector Employment Funds – Phase II	TBD	To provide core, intensive, training and support services to 185 displaced workers, recently affected by layoff and/or plant closures in the past few months, particularly from Capital One, Fresh Express and River Ranch.	This is a phase II grant, with South Bay WIB in Hawthorne, CA as the lead, and 21 other LWIBS throughout CA, providing core, intensive, training and support services to dislocated workers. The aim for the MCWIB is to serve.	



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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE  
**FROM:** JOYCE ALDRICH, WIB CONSULTANT  
**SUBJECT:** UPDATE ON MONTEREY COUNTY'S LOCAL WORKFORCE INVESTMENT AREA (LWIA) BUDGET  
**DATE:** JULY 12, 2012

**INFORMATION:** Attached is the current LWIA 2011-12 Fiscal Year Budget as of May 31, 2012.

**Workforce Investment Act (WIA) Formula Funds:**

**Adult Program:** \$2,424,102 (120%) of \$2,021,123 is over expended.

**Dislocated Worker Program:** \$2,025,032 (94%) of \$2,161,232 is expended.

**Youth Program:** \$1,688,722 (81%) of \$2,089,290 is expended.

**Rapid Response Program:** \$156,538 (38%) of \$408,896 is expended.

**Special Grants:**

**National Emergency Grant (NEG) On-the-Job Training:** \$245,469 (102%) of \$240,512 is expended.

**New Start Grant:** \$59,923 (110%) of \$54,476 is expended.

**Incentive Grant:** \$9,117 (100%) of \$9,117 is expended.

**NEG Multi Sector Grant:** \$133,634 (30%) of \$444,385 is expended.

**AB109 Probation Reimbursement:** \$42,890 (18%) of \$235,333 is expended.

**Workforce Solutions Reimbursement:** \$31,613 (13%) of \$234,313 is expended.

**Total WIA and Non-WIA budget:** \$6,817,040 (86%) of \$7,898,677 is expended. The remaining balance is \$1,081,637.

**ATTACHMENTS:** Reference attached budget for details.

	REVENUE	%	OET BUDGET STAFF	OET BUDGET OVERHEAD	OET BUDGET PARTICIPANTS	WIB BUDGET STAFF	WIB BUDGET OVERHEAD	BUDGET ADMIN	BUDGET SUBS	BUDGET TOTALS	% EXPENDED
<b>ADULT DISADVANTAGED</b>	1,683,159										
CARRY-IN FROM 2011	337,964	26%	466,194	192,827	303,168	184,498	42,314	202,122	630,000	2,021,123	120%
			1,100,078	363,488	36,504	126,662	31,995	262,010	503,364	2,424,102	
<b>DISLOCATED WORKER</b>	2,117,611										
CARRY-IN FROM 2011	43,621	27%	1,195,145	232,354	324,184	157,341	36,085	216,123	0	2,161,232	94%
			1,214,281	388,588	26,895	141,015	35,375	218,877		2,025,032	
<b>YOUTH</b>	1,753,465										
CARRY-IN FROM 2011	335,825	26%	729,269	219,306	313,393	238,357	52,436	208,929	327,600	2,089,290	
	-		646,132	209,854	370,248	94,814	17,868	217,670	132,137	1,688,722	81%
<b>NEG/SHORELINE</b>	240,512										
carry in from 2011		3%	(25,409)	(5,827)	61,750	25,409	5,827	24,051	154,711	240,512	102%
			35,346	8,678	16,933	5,380	1,204	25,671	152,256	245,469	
<b>NEW START</b>	54,476										
KICK START		1%	43,697	5,332				5,447		54,476	
			49,133	5,343				5,447		59,923	110%
<b>RAPID RESPONSE393</b>	176,535										
		2%	127,471	20,438	8,925	8,925	2,047	17,654		176,535	89%
			79,668	26,636	8,430	8,430	24,884	16,920		156,538	
<b>RAPID RESPONSE 540 K282485</b>	58,090										
		1%	45,343	6,938				5,809		58,090	0%
								0		0	
<b>RAPID RESPONSE 541 K282485</b>	174,271										
		2%	141,844	15,000				17,427		174,271	0%
										0	
<b>INCENTIVE 2010-2012</b>	9,117										
		0%			8,206			911		9,117	100%
					9,117			0		9,117	
<b>TOTAL WIA FUNDS</b>	6,984,646		2,723,554	686,368	1,010,701	614,530	138,709	698,473	1,112,311	6,984,646	
			3,124,638	1,002,587	459,698	376,302	111,327	746,594	787,757	6,608,904	
<b>NON WIA FUNDS</b>											
AB109 PROBATION	235,333										
REIMBURSEMENT FROM PROBATION		3%	42,467	5,801				23,533	169,333	235,333	18%
			36,008					1,080		42,890	
<b>WORKFORCE SOLUTIONS-CWES</b>	234,313										
REIMBURSEMENT FROM DSS		3%	32,364	28,118	150,400			23,431		234,313	13%
			22,807	3,688	3,507			1,611		31,613	
<b>NEW GRANT/MULTI SECTOR 2011-2013</b>	444,385										
\$		6%	95,040	37	296,257	5,192	3,421	44,438		444,385	30%
			86,694	18,140	10,355	5,380	0	13,065		133,634	
<b>NON WIA BUDGET</b>	914,031										
			169,871	28,155	446,657	5,192	3,421	91,402	169,333	914,031	
			145,509	27,629	13,862	5,380	0	15,756	0	208,136	
<b>TOTAL WIA AND NON WIA BUDGETS</b>	7,898,677	100%	2,893,425	714,523	1,457,358	619,722	142,130	789,875	1,281,644	7,898,677	
EXPENSES AS OF			3,270,148	1,030,216	473,560	381,682	111,327	762,350	787,757	6,817,040	86%
<b>REMAINING</b>			(376,723)	(315,693)	983,798	238,040	30,803	27,525	493,887	1,081,637	14%

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE  
**FROM:** MARLEEN ESQUERRA, WIB ANALYST  
**SUBJECT:** DISCUSS THE BUDGET AD-HOC WORKGROUP  
**DATE:** JULY 12, 2012

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**INFORMATION/SUMMARY:**

**BUDGET Ad Hoc WORKGROUP**

The Budget Ad Hoc Workgroup shall include members from the full WIB, assigned by the WIB Chair. The workgroup may be charged by the WIB Chair to consider the following proposed items:

- Consider what impacts the Local Workforce Investment Area (LWIA) budget for PY 2012-13 is having on participant services, staff, cost of services and infrastructure.
- Ensure that appropriate mechanisms are in place so that the full WIB and appropriate program operators, and fiscal staff are regularly informed about the effects of the new budget. (i.e. Staff and or budget changes, fund transfers, new grant awards, staff costs, under expenditures and projected over expenditures.)
- Meet on a quarterly basis or as needed. It is anticipated that the workgroup will begin meeting in the first quarter of PY 2012-13 to understand and discuss the LWIA budget.

LWIA budget areas for discussion may include:

- Revenue projections to include WIA grants, carry-in funds, incentives, special project and competitive grants.
- Review cost allocation plans and pools.
- Resources (program operators & staff) assigned to the grant programs.
- Expenditure projections to include salaries and benefits, admin expenses, operational expenses, participant expenses (training SB 734 & supportive services), and other allocated and allowable expenses.
- Grant terms
- Local plan and customer groups to be served.
- Leveraging other funds.
- Are there reserves and/or carry over funds available? If so, discuss reserves necessary for long-range stability.