



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, May 9, 2013

8:30-10:00am

Oversight Committee Members:

Mary Ann Leffel, Chair

Al Davis
Cesar Lara
Judith Profeta
Larry Silva
Teresa Sullivan
Brian Turlington
Andrea Zeller-Nield

AGENDA

CALL TO ORDER/INTRODUCTIONS:	Mary Ann Leffel, <i>Chair</i>
CHANGES TO AGENDA:	
PUBLIC COMMENT:	
CONSENT CALENDAR:	Mary Ann Leffel
1. Approve the minutes of the April 11, 2013 Oversight Committee meeting.	
DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS:	
1. Update on WIA Rapid Response program and activities for PY 2012-13.	Joyce Aldrich
2. Receive a report on the WIA 25% Dislocated Worker Additional Assistance special project grant for PY 2012-13.	Joyce Aldrich
3. Receive a report on the WIA Adult and Dislocated Worker programs and activities for PY 2012-13.	Marleen Esquerra Wil Moore Rosie Chavez Alma McHoney
4. Receive a report on the number of local WIA training placements and expenditures for 2012-13.	Marleen Esquerra
5. Update on the Local Workforce Investment Area budget for PY 2012-13.	Joyce Aldrich
6. Consider and approve the Local Workforce Investment Area budget for PY 2013-14.	Joyce Aldrich
7. Consider and recommend the status of the WIA Title I Adult subcontracts with Shoreline and Turning Point due the Department of Labor's mandatory reductions impacting all WIA funding levels effective Program Year 2013-14.	Joyce Aldrich
ANNOUNCEMENTS OF EVENTS:	Mary Ann Leffel
SUBCOMMITTEE MEETINGS: Executive: 5/15/2013 – Shoreline, Marina Oversight: 6/13/2013 – Shoreline, Marina Youth: 5/14/2013 – Shoreline, Marina Business Services: 6/18/2013 – Marina Library	WIB MEETINGS: 6/5/2013: Marina Library, Marina
ADJOURN:	Mary Ann Leffel
To request information, please contact the Monterey County Workforce Investment Board staff at (831) 796-6434 or visit our website at www.montereycountywib.org .	

Monterey County
Workforce Investment
Board (WIB)

Joyce Aldrich,
Executive Director

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UNADOPTED

Monterey County Workforce Investment Board
Oversight Committee
Thursday, April 11, 2013, 8:30am
 Shoreline Workforce Development, 249 10th Street, Marina, CA

MEMBERS PRESENT: Cesar Lara, Larry Silva, Teresa Sullivan, Brian Turlington and Andrea Zeller-Nield

MEMBERS ABSENT: Mary Ann Leffel (excused), Al Davis (excused) and Judith Profeta (excused)

STAFF PRESENT: Joyce Aldrich, Marleen Esquerra and Flor Galvan

OTHERS PRESENT: Rosie Chavez, Alma McHoney and Wil Moore

CALL TO ORDER/INTRODUCTIONS: Mr. Lara began the meeting at 8:33am. Because of the absence of a quorum, the meeting proceeded with Information Item #1.

CHANGES TO AGENDA: None

PUBLIC COMMENT: None

INFORMATION ITEMS:

- 1. Update on monitoring activities of the Monterey County's local workforce investment system for PY 2012-13.** Ms. Aldrich reported on the local monitoring activities to date. The monitoring of Shoreline and Turning Point's Adult programs were completed in February. The monitoring of the Office for Employment Training's Adult, Dislocated Worker and Rapid Response programs is currently in progress; however the Youth program monitoring has yet to be scheduled. Ms. Aldrich stated the monitoring of the Dislocated Worker Additional Assistance special project grant will begin at the end of April or early May.

DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS:

- 1. Update on WIA Rapid Response program and activities for PY 2012-13.** Ms. Aldrich reported that Capital One continues to be the largest plant closure with 782 individuals affected. She stated that the Rapid Response Team continues to hold several orientations to provide information on available services. To date, over 220 associates are currently enrolled under the Dislocated Worker Additional Assistance grant; exceeding the enrollment goal of 185. The Rapid Response Team has also been working with Green Mountain Coffee Roasters since December and it's anticipated that a number of the affected employees will obtain employment prior to the scheduled Rapid Response orientation. Ms. Aldrich reported that only one individual from the closure of Ethan Allen has requested assistance while the others were able to relocate to the San Jose area for employment. Ms. Aldrich stated that the WIB received notification of the closure of Chevy's and thus far one individual has received services at the One Stop. Another restaurant will be taking the place of the former Chevy's location and therefore many of the employees are hoping to be picked up by the new restaurant.

Mr. Lara called the meeting to order at 8:45am and asked for introductions. A quorum was established.

CONSENT CALENDAR:

- 1. Approve the minutes of the January 10, 2013 Oversight Committee meeting.**

Motion: Mr. Silva motioned to accept the action as stated.

Second: Ms. Sullivan

Motion Passed Unanimously

DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS:

- 2. Update on the Local Workforce Investment Area budget for PY 2012-13 and the budget process for PY 2013-14.** Ms. Aldrich reported that the WIB has been diligently working with the subcontractors concerning the timely submission of their invoices. She reported the budget reflects the expenditures for the period ending February 2013. The Adult program expenditures are at 81%; Dislocated Worker is at 60%; and Rapid Response is at 49%. It's anticipated that any unspent Rapid Response funds will allowed to be rolled over into the next fiscal year due to sequestration. The Dislocated Worker Additional Assistance grant

expenditures are at 25%; however it's anticipated to be significantly higher due to the obligation of training funds. She stated the Youth expenditures are at 46%; however it should increase once the Summer Youth Employment Program ramps up in the coming months. Mr. Silva inquired how the WIB plans to reach a balanced budget at the end of the fiscal year for the Adult program funding stream. Ms. Aldrich responded that she requested that OET suspend enrollments and assessments for the Adult program and that the subcontractors cease referring Adults to the One Stop until further notice. She also requested that employees; with the exception of a case manager, currently working in the Adult program be moved to work under the Youth and Dislocated Worker Programs. Although staffing will be scaled back under the Adult program due to budget constraints, Ms. Aldrich emphasized that clients will still be able to use utilize the One Stop for universal services.

3. **Update on the Employment Training Panel funding award.** Ms. Aldrich reported that the award of \$401,640 was received by several WIBs in partnership with Monterey County who applied for ETP funding with the Small Business Development Center. The funding will be used to serve manufacturing companies in our area. Ms. Zeller-Nield stated that she announced the funding opportunity to her database of employers and Nature's Energy Group was the only employer who expressed interest in retraining its workforce. The funds are not limited to only serve this employer. The funding will help small businesses to skill up their employees and assist with overall performance of small business expansion.
4. **Receive a report on the WIA 25% Dislocated Worker Additional Assistance special project grant for PY 2012-13.** Ms. Aldrich reported that this grant was written to primarily serve workers impacted by mass layoffs primarily in the banking and manufacturing industries. Capital One associates are currently being served by OET and Shoreline who have been working really hard to ensure this grant is successful. Shoreline took the early initiative to work closely with Lee Hecht Harrison & Associates and met their planned enrollment goal in January. As of April, OET exceeded their enrollment goal of 105, by enrolling 143 associates. Collectively, both agencies enrolled 221 individuals, exceeding the planned enrollment goal at 119%. Of those enrolled, 100 are currently receiving training services, exceeding the planned training enrollment goal at 125%.
5. **Receive a report on the WIA Adult and Dislocated Worker programs and activities for PY 2012-13.** Ms. Esquerra reported that all providers have successfully exceeded all of the Common Measure Adult and Dislocated Worker performance target goals for Program Year 2012-13. Ms. Esquerra shared a line graph which demonstrated the increase in success levels over the last three quarters.

OET: Ms. McHoney reported that OET enrolled 159 (52%) new participants and is meeting their WIA Adult planned training enrollments goal at 100% for on-the-job training placements. For the Dislocated Worker program, OET enrolled 279 (62%) of their planned goal with 27 (108%) of their planned goal enrolled into training. For the next meeting, Ms. Sullivan stated that she would like to see the number of older Americans served throughout the One Stop delivery system.

Shoreline: Mr. Moore reported that Shoreline enrolled 63 (98%) of their planned enrollments with 31 (83%) entered into training. He stated that Shoreline struggles with meeting the geographical target goals for South County because of the lack of businesses and their program location; however they are meeting the enrollment goals for Central, North and West County areas.

Turning Point: Ms. Chavez reported that Turning Point has exceeded its enrollment goal at 106% and exceeded its training enrollment goal at 148%. She stated that they were successful in developing on-the-job training contracts with 29 new employers this year. She also reported that Turning Point is meeting all the geographic enrollment goals with the exception of South County, which has been difficult; however they continue to make progress and are working to bring up their numbers.

6. **Receive a report on the number of local WIA training placements and expenditures for 2012-13.** Ms. Esquerra stated since the training placements and expenditures were discussed during today's meeting under agenda item #4, there's nothing more to report.

ANNOUNCEMENT OF EVENTS: Mr. Silva reported that D'Arrigo Brothers is looking for workers.

ADJOURNMENT: Mr. Lara motioned to adjourn the meeting at 10:06am

Motion: Mr. Turlington motioned to accept the action as stated.

Second: Ms. Zeller-Nield

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: UPDATE ON WIA RAPID RESPONSE PROGRAM AND ACTIVITIES FOR PY 2012-13

DATE: MAY 9, 2013

INFORMATION:

WIB staff will present an update on the most recent Rapid Response (RR) activities provided to employers in Monterey County, including small businesses.

Below is a list of employers impacted by layoffs in 2013:

Company Name	City	Date of Initial Layoff	Anticipated number of affected employees	# of those attended RR orientation	# of those who signed up for services YTD
Capital One	Salinas	Jan 2013 (1 st phase) April 5, 2013 (2 nd phase) Next phase will be in July with separation notices set for Oct/Nov.	782	50, 35, 127, 140, 60	257 enrolled under the DWAA and or the DW grants. 124 are enrolled in training.
Green Mountain Coffee Roasters	Castroville	Layoff notices were sent to workers on Jan 7, 2013. Official layoff Feb 27, 2013. Rapid Response presentations are scheduled for April 29, 2013 and May 2, 2013 – 2 sessions each	45	44 signed up to attend RR orientations held on April 29 th and May 2 nd , however only 10 showed	TBD
Ethan Allen	Salinas	January 2013	3	1	1; remaining 2 relocated to work at Ethan Allen in the Jose area.
Chevys	Salinas	February 2013	Approx. 50 No notice received to date.	TBD	TBD

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: RECEIVE A REPORT ON THE WIA 25% DISLOCATED WORKER ADDITIONAL ASSISTANCE SPECIAL PROJECT GRANT FOR PY 2012-13

DATE: MAY 9, 2013

INFORMATION:

This report provides an update on the 25 Percent Governor's Dislocated Worker Additional Assistance grant, a project divided amongst two providers, the Office for Employment Training (OET) and Shoreline Workforce Development Services (Shoreline) to provide re-employment and training services to displaced workers impacted by mass layoffs, primarily in the banking and manufacturing industries.

Since the last Oversight Committee meeting held in April 2013, the total number of enrollments have substantially increased from 221 to 257 (or 139%) exceeding the planned enrollment goal of 185. Also, the number of training enrollments increased from 100 to 124 (or 155%) from the previous month, exceeding the planned training enrollment goal of 80.

To date, the total funding that is obligated towards training and supportive services is \$506,293. Other funding streams will be used to cover the additional costs for training which includes co-enrolling individuals under the WIA formula Dislocated Worker grant and also leveraging supportive services funds under the grant agreement.

The tables below are a summary of the number of planned enrollments and expenditures:

DWAA Services	Total Plan	Total Actual	OET		Shoreline	
			Plan	Actual	Plan	Actual
Core & Intensive Registered Enrollments	185	257 (139%)	105	180	80	77
Training Enrollments	80	124 (155%)	45	84	35	40
Exits from the Program	185	3	105	0	80	3
Placed in Unsubsidized Employment	63.4%	TBD	70	0	55	0
Employment Retention Goal	80%	TBD				
Avg. Earnings Replacement	\$12,500	TBD				

Training & Supportive Services (SS) Expenditures	Total Plan	YTD Expended	% Expended	Balance
Training & SS Expenditures	\$430,000	\$107,499*	25%	\$322,501

*As of March 31, 2013, \$506,293 has been obligated towards participant training and supportive services costs.

Total Budget Expenditures	Total Plan	YTD Expended	% Expended	Balance
Total Budget Expenditures	\$999,847	\$423,919	42%	575,928

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: RECEIVE A REPORT ON THE WIA ADULT AND DISLOCATED WORKER PROGRAMS AND ACTIVITIES FOR PY 2012-13

DATE: MAY 9, 2013

INFORMATION:

This report provides a fiscal and performance status update on all WIA Adult and Dislocated Worker program providers to include the Office for Employment Training (OET), Shoreline Workforce Development Services and Turning Point of Central CA.

The table below indicates the total WIA Adult and Dislocated Worker budget and expenditures for Program Year (PY) 2012-13. As of April 30, 2013, Monterey County expended 86% of its WIA Adult funds and 69% of its Dislocated Worker funds, as outlined below:

WIA Budget	Adult	Dislocated Worker
Carry-In funds from PY 2011-12	\$0	\$0
PY 2012-13 Allocation	\$1,684,911	\$1,950,439
Total Budget	\$1,684,911	\$1,950,439
OET & Subcontract Program & Training Expenditures	1,276,755	1,132,310
WIB and Admin Expenditures	163,971	214,264
YTD Expenditures as of 1/31/2013*	\$1,440,726	\$1,346,573
Balance	\$244,185	\$603,866
Percent Expended	86%	69%

*Expenditures do not reflect fiscal claims for Shoreline for March 2013.

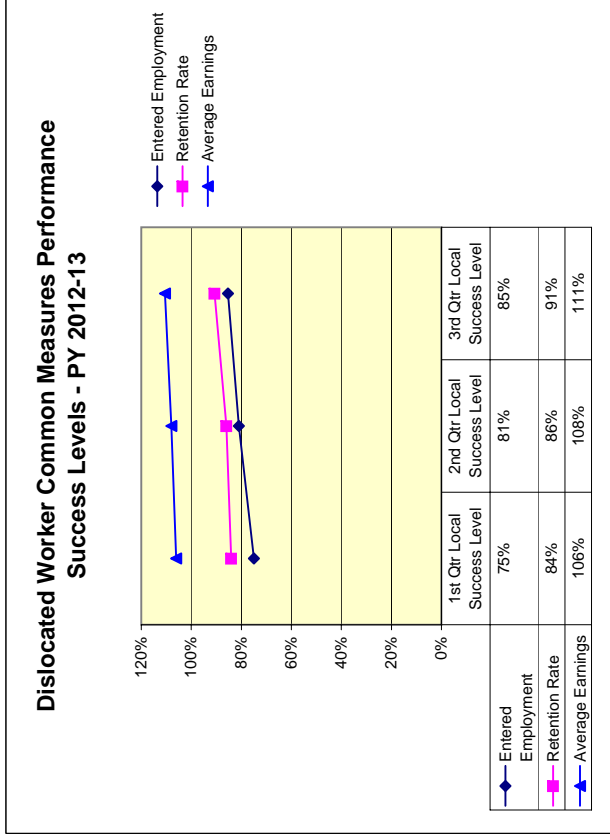
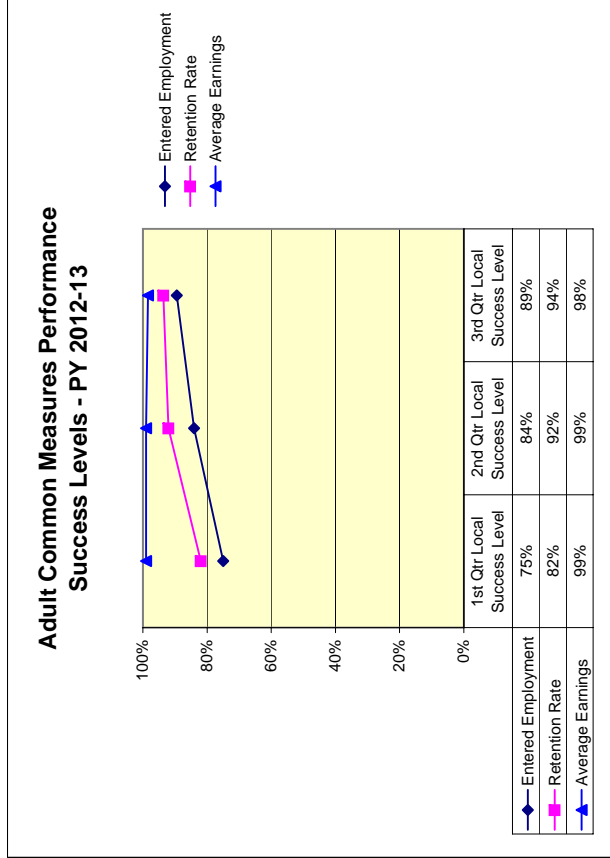
Monterey County must achieve a success rate of 80% or higher on the following Common Measures. For Program Year 2012-13, Monterey County is exceeding its Adult and Dislocated Worker Common Measures performance levels for the 3rd Quarter period are as follows:

Adult	Target Performance Level	Actual Performance Level	Local Success Level	Met 100% Goal?	Met 80% Target?
Entered Employment	67.0%	59.95%	89%	No	Yes
Retention Rate	75.0%	70.22%	94%	No	Yes
Average Earnings	\$10,550	\$10,384	98%	No	Yes
Dislocated Worker	Target Performance Level	Actual Performance Level	Local Success Level	Met 100% Goal?	Met 80% Target?
Entered Employment	63.4%	54.13%	85%	No	Yes
Retention Rate	80.0%	72.54%	91%	No	Yes
Average Earnings	\$12,500	\$13,817	111%	Yes	Yes

The following line graph demonstrates the increase in Common Measure performance success levels over the last three quarters for Program Year 2012-13.

The subsequent reports include a summary of each individual program providers' performance from July 1, 2012 through April 30, 2013.

Common Measures Performance Success Levels 1st - 3rd Quarter Period Comparisons



1st - 3rd Quarter Period Comparisons - Data

Adult	Target Performance Level	3rd Qtr Actual Performance Level	1st Qtr Local Success Level	2nd Qtr Local Success Level	3rd Qtr Local Success Level	Change in Qtr 3 Success Levels since last Oversight meeting:	Met 80% Target?	Met 100% Goal?
Entered Employment	67.00%	59.95%	75%	84%	89%	Gain of 14%	Yes	No
Retention Rate	75.00%	70.22%	82%	92%	94%	Gain of 11%	Yes	No
Average Earnings	\$10,550	\$10,384	99%	99%	98%	Loss of 1%; diff of \$80	Yes	No

Dislocated Worker	Target Performance Level	3rd Qtr Actual Performance Level	1st Qtr Local Success Level	2nd Qtr Local Success Level	3rd Qtr Local Success Level	Change in Qtr 3 Success Levels since last Oversight meeting:	Met 80% Target?	Met 100% Goal?
Entered Employment	63.40%	54.13%	75%	81%	85%	Gain of 10%	Yes	No
Retention Rate	80.00%	72.54%	84%	86%	91%	Gain of 7%	Yes	No
Average Earnings	\$12,500	\$13,817	106%	108%	111%	Gain of 5%; diff of \$6.15	Yes	Yes



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

Provider: Office for Employment Training

For the period ending: April 2013 – Program Year 2012-13

ENROLLMENT GOALS

Monthly Participant Plan Summary	TARGET GOAL *	YTD Actual	% of Goal
1. Total # of CARRY-IN enrollments	250	99	40%
2. Total # of NEW enrollments	303	161	53%
3. Total # of ALL enrollments	553	260	47%
4. Total # of WorkKeys Readiness Indicator			

**Based on PY 2011-12 Local Plan Goals; carried over to PY 2012-13*

Participant Plan Summary	Target Goal	YTD Actual	% of Goal
1. Total # of On-the-Job Training or Individual Training Accounts (OJT/ITA)	0	25	100%
2. Total # of WorkKeys assessments completed (includes Adult & DW)			

INDUSTRY CLUSTERS – PLACEMENTS

Placements	YTD Actual	% of Goal
Total # and percentage of OJT/ITA placements, based on the following industry clusters	25	
Agriculture		
Building/Design: construction	7	28%
Healthcare	7	28%
Education		
Hospitality/Tourism: Driver, Host	1	4%
Creative/Technology		
Other (Finance, Retail, Sales, etc.)	10	40%

GEOGRAPHIC AREAS SERVED

Period ending April 2013	TARGET GOAL	MINIMUM GOAL	Actual All	% of Actual
Central (Salinas)	55%	10%	154	59%
North	11%	10%	10	4%
South	18%	10%	43	17%
West	16%	10%	42	16%
Outside of Monterey County	16%	10%	11	4%

TARGET POPULATIONS SERVED

Period ending April 2013	TARGET GOAL	Actual All	% of Actual
Homeless	5%	TBD	TBD
Offenders	20%	TBD	TBD
Disabilities	16%	TBD	TBD
TANF	12%	TBD	TBD
Veterans	10%	TBD	TBD
Older Workers (55 and older)	5%	14	5%
High School Dropout	20%	TBD	TBD
Limited English	10%	TBD	TBD

PERFORMANCE GOALS

Quarter ending March 2013	Plan	Actual	Success Level	Target Goal Met? (Min 80%)
1. Total number of exits		255		
2. Entered Employment Rate – entry into unsubsidized employment	67%	54%	81%	Yes
3. Retention Rate – 6 months after entry into unsubsidized employment	75%	71%	95%	Yes
4. Average Earnings – increased earnings in unsubsidized employment	\$10,550	\$10,540	99.91%	Yes

ACTIVITIES

TRAINING PLACEMENTS BY OCCUPATIONAL TITLE

- Accountants
- Barbers
- Bookkeeping, Accounting, and Auditing Clerks
- Chefs and Head Cooks
- Construction Laborers
- First-Line Supervisors of Office
- Heavy and Tractor-Trailer Truck Drivers
- Insurance Sales Agents
- Medical Assistants
- Medical Records and Health Info Technicians
- Nursing Aides, Orderlies, and Attendants
- Office Clerks, General
- Retail Salespersons



**Monterey County Workforce Investment Board
Workforce Investment Act (WIA) Title I – DISLOCATED WORKER PROGRAM SERVICES**

Provider: Office for Employment Training

For the period ending: April 2013 – Program Year 2012-13

ENROLLMENT GOALS

Monthly Participant Plan Summary	TARGET GOAL *	YTD Actual	% of Goal
1. Total # of CARRY-IN enrollments	300	107	36%
2. Total # of NEW enrollments	450	300	67%
3. Total # of ALL enrollments	750	407	54%
4. Total # of WorkKeys Readiness Indicator			

**Based on PY 2011-12 Local Plan Goals; carried over to PY 2012-13*

Participant Plan Summary	Target Goal	YTD Actual	% of Goal
1. Total # of On-the-Job Training or Individual Training Accounts (OJT/ITA)	25	30	108%
2. Total # of WorkKeys assessments completed (includes Adult & DW)			

INDUSTRY CLUSTERS – PLACEMENTS

Placements	YTD Actual	% of Goal
Total # and percentage of OJT/ITA placements, based on the following industry clusters	30	100%
Agriculture	8	27%
Building/Design: construction	2	7%
Healthcare	5	17%
Education	1	3%
Hospitality/Tourism: Driver, Host	1	3%
Creative/Technology		
Other (Finance, Retail, Sales, etc.)	13	43%

GEOGRAPHIC AREAS SERVED

Period ending April 2013	TARGET GOAL	MINIMUM GOAL	Actual All	% of Actual
Central (Salinas)	55%	10%	260	64%
North	11%	10%	14	3%
South	18%	10%	45	11%
West	16%	10%	62	15%
Outside of Monterey County	16%	10%	26	6%

TARGET POPULATIONS SERVED

Period ending April 2013	TARGET GOAL	Actual All	% of Actual
Homeless	5%	TBD	TBD
Offenders	20%	TBD	TBD
Disabilities	16%	TBD	TBD
TANF	12%	TBD	TBD
Veterans	10%	TBD	TBD
Older Workers (55 and older)	5%	62	15%
High School Dropout	20%	TBD	TBD
Limited English	10%	TBD	TBD

PERFORMANCE GOALS

Quarter ending March 2013	Plan	Actual	Success Level	Target Goal Met? (Min 80%)
1. Total number of exits	350	218		
2. Entered Employment Rate – entry into unsubsidized employment	63%	53.2%	84%	Yes
3. Retention Rate – 6 months after entry into unsubsidized employment	80%	72.5%	91%	Yes
4. Average Earnings – increased earnings in unsubsidized employment	\$12,500	\$13,817	111%	Exceeded 100% Goal

ACTIVITIES

TRAINING PLACEMENTS BY OCCUPATIONAL TITLE

- Air Traffic Controllers
- Light Truck or Delivery Services Drivers
- Bookkeeping, Accounting, and Auditing Clerks
- Medical and Clinical Lab Tech
- Computer Occupations
- Network and Computer Systems Admin
- Construction Managers
- Office Clerks, General
- Cooks, All Other
- Outdoor Power Equipment, Mechanics
- Executive Secretaries and Administrative Assistants
- Pharmacy Technicians
- Healthcare Support Workers, All Other
- Registered Nurses
- Heating and Air Conditioning Mechanics and Installers
- Skincare Specialists
- Heavy and Tractor-Trailer Truck Drivers
- Special Ed Teachers, Preschool, etc
- Insurance Sales Agents
- Stock Clerks- Stockroom, Warehouse, or Storage Yard



**Monterey County Workforce Investment Board
Workforce Investment Act (WIA) Title I**

Provider: Office for Employment Training

For the period: January – March 2013

Summary of Walk-Ins – CORE Services		January 2013	February 2013	March 2013	April 2013	May 2013	June 2013	TOTAL
King City		15	12	15				
Salinas		478	767	913				
Seaside		136	161	58				
TOTAL OF ALL CORE SERVICES		629	940	986				2,555

OET Core Services are not entered into VOS - staff keep a sign in log.

Core Services provided include Orientation, Initial Assessment, Information on Training Providers and referrals after determination of appropriate agency, Staff Assisted Job Referrals, VOS Resume Assistance, Eligibility Interviews and Assistance with on-line employment applications.

Additionally staff monitor use of computers, fax machines and copiers, answer questions from walk-ins and telephone referrals.

Seaside: One staff person provides services, two days per week (Tuesday & Thursday).

King City: One person, every 2 weeks (Friday).



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

Subcontractor: Shoreline Workforce Development Services

Program Design: to provide core, intensive, training and supportive services to 69 WIA eligible adults (>=18 years) who face multiple barriers to employment, are low-income, 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. 36 will participate in On-the-Job Training (OJT) or Individual Training Accounts (ITA). 33 participants will receive direct placement services. Shoreline’s service model includes 4 Anchor partnerships to provide collaboration, points of contact and a full range of services. 5 Feeder partnerships will outreach, target and refer participants to the Anchor locations from one of five neighborhood career centers located in Salinas, Marina, Watsonville, San Luis Obispo & King City.

For the period ending: April 2013 - New Program Year 2012-13

ENROLLMENT GOALS

Monthly Participant Plan Summary	Total TARGET GOAL	Cumulative Monthly Plan	YTD Monthly Actual	Monthly %
1. Total # of new enrollments (Core & Intensive Services)	69	68	70	102.94%
2. Total # of On-the-Job Training or Individual Training Accounts (OJT/ITA)	36	37	37	100%
3. Total # of Direct Placements	33	n/a	33	100%
4. Total # of Training (OJT/ITA) and Direct Placements (DP)			70	
5. Total # of WorkKeys Readiness Indicator			67	
▪ Applied Mathematics				
▪ Reading for Information				
▪ Locating Information				

INDUSTRY CLUSTERS – PLACEMENTS

Monthly Placements	OJT/ITA /DP Total #	% of Total
Total # and percentage of OJT/ITA/DP placements, based on the following industry clusters	70	100%
Agriculture	5	7%
Building/Design	7	10%
Healthcare	17	24%
Education	4	6%
Hospitality/Tourism	5	7%
Creative/Technology		
Other (Finance, Retail, Sales, etc.)	32	46%

GEOGRAPHIC AREAS SERVED

Quarter ending <u>March 2013</u>	TARGET GOAL	MINIMUM GOAL	Actual (OJT/ITA and DP)	% of Actual
Central (Salinas)	35%	10%	53	75%
North	25%	10%	6	9%
South	20%	10%	2	3%
West	20%	10%	9	13%

TARGET POPULATIONS SERVED

Quarter ending <u>March 2013</u>	TARGET GOAL	MINIMUM GOAL	Actual (OJT/ITA and DP)	% of Actual
Veterans & Eligible Spouses	19%	10%	1	1.42%
High School Dropout	39%	20%	24	34.28%
Disabled	19%	16%	17	24.28%
Ex Offender (Contracted target goal)	13%	10%	20	28.57%
Homeless	19%	5%	30	42.85%

PERFORMANCE GOALS

Quarter ending <u>March 2013</u>	Plan	Actual
1. Total number of exits	50	47
2. Entered Employment Rate – entry into unsubsidized employment	35	46
3. Retention Rate – 6 months after entry into unsubsidized employment	75.0%	97.87
4. Average Earnings – increased earnings in unsubsidized employment	\$10,550	
5. Average hourly wage		\$11.33

ACTIVITIES

- Exceeded Contract 10% SB734 Contract Leverage Goal
- Met with Housing Authority to discuss a workshop series
- Hosting Cap One IT training cohort at Salinas Career Center
- Submitted VEAP veteran contract proposal

2012-2013 Shoreline WDS OJT/Direct Placements by Occupational Title

- Medical Assistant
- Periodontal Assistant
- Solar Installer
- Massage Therapist
- Maintenance Worker
- Cashier
- Product Technician
- Class A Driver
- Customer Service Representative
- Delivery Driver
- Security Guard
- Laborer
- Truck Driver
- New Accounts Representative
- Receptionist
- Assistant Manager
- Lot Associate
- Baker
- Janitor
- Oil Technician
- Cook
- Accounts Receivable
- Electrician
- Sales Manager
- Pharmacy Attendant
- Pre-School Teacher
- Office Assistant
- Electronic Assembler
- Administrative Assistant
- Vet Assistant/Clerical
- Construction Worker
- Sanitizer
- Groomer
- Medical Secretary
- Dental Assistant
- Caregiver



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

Subcontractor: Turning Point of Central California

Program Design: to provide core, intensive, training and supportive services to **63** WIA eligible adults (>=18 years) who face multiple barriers to employment, are low-income, 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, with a focus on serving those on parole and probation. **38** will participate in On-the-Job Training (OJT) or Individual Training Accounts (ITA). **25** participants will receive direct placement services. Turning Point is the lead agency of an integrated service model comprised of ten collaborative partners throughout Monterey County.

For the period ending: April 30, 2013 – New Program Year 2012-13

ENROLLMENT GOALS

Monthly Participant Plan Summary	Total TARGET GOAL	Cumulative Monthly Plan	YTD Monthly Actual	Monthly %
1. Total # of new enrollments (Core & Intensive Services)	63	53	62	117%
2. Total # of On-the-Job Training or Individual Training Accounts (OJT/ITA)	38	34	40	118%
3. Total # of Direct Placements (DP)	25	n/a	22	n/a
4. Total # of Training (OJT/ITA) and Direct Placements (DP)			62	
5. Total # of WorkKeys assessments completed	38	34	40	118%
▪ Applied Mathematics	38	34	40	118%
▪ Reading for Information	38	34	41	121%
▪ Locating Information	38	34	40	118%

INDUSTRY CLUSTERS – PLACEMENTS

Monthly Placements	OJT/ITA /DP Total #	% of Total
Total # and percentage of OJT/ITA /DP placements, based on the following industry clusters	62	100%
Agriculture	6	10%
Building/Design	12	19%
Healthcare	2	3%
Education	0	0%
Hospitality/Tourism	16	26%
Creative/Technology	1	2%
Other (Finance, Retail, Sales, etc.)	25	40%

GEOGRAPHIC AREAS SERVED

Quarter ending <u>March 2013</u>	TARGET GOAL	MINIMUM GOAL	Actual (OJT/ITA)	% of Actual
Central (Salinas)	55%	10%	25	63%
North	11%	10%	6	15%
South	18%	10%	2	5%
West	16%	10%	7	18%

TARGET POPULATIONS SERVED

Quarter ending <u>March 2013</u>	TARGET GOAL*	MINIMUM GOAL	Actual (OJT/ITA)	% of Actual
Veterans & Eligible Spouses	5%	10%	5	13%
High School Dropout	15%	20%	15	38%
Disabled	15%	16%	29	73%
Ex Offender	50%	20%	39	98%
Homeless	15%	5%	9	23%

*Turning Point is contracted to meet the Target Goals.

PERFORMANCE GOALS

Quarter ending <u>March 2013</u>	Plan	Actual
1. Total number of exits	63	48
2. Entered Employment Rate – entry into unsubsidized employment	67.0%	88%
3. Retention Rate – 6 months after entry into unsubsidized employment	75.0%	
4. Average Earnings – increased earnings in unsubsidized employment	\$10,550	\$23,426
5. Average hourly wage		\$11.26

ACTIVITIES

- Conducting program presentations and client recruitment at Sun Street Centers.

Turning Point – Placements: **40**

Total # and percentage of OJT/ITA placements, based on the following industry clusters:

Agriculture: **4**

Harvester, Driver (2), Quality Assurance

Building/Design: **9**

Restoration Technician, Electrician (2), Metal Fabricator (2), Pool Maintenance (2), Plumber's Helper, Spray Foam Asst.

Healthcare: **1**

Mental Health Counselor,

Education:

Hospitality/Tourism: **10**

Convenient Store Clerk (5), Cashier (2), Relief Manager (2), Guest Service

Creative/Technology: **1**

Tech Support

Other: **15**

Driver (5), Loan Processor, Administrative Asst., House Cleaner, Auto Mechanic, Sales, Tool Repairman, Landscaper, Accounting Clerk, Baker's Helper

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: RECEIVE A REPORT ON THE NUMBER OF LOCAL WIA TRAINING PLACEMENTS AND EXPENDITURES FOR 2012-13

DATE: MAY 9, 2013

INFORMATION: Effective Program Year (PY) 2012-13, local Workforce Investment Boards are required to spend at least 25 percent of the combined total of their Adult and Dislocated Worker WIA Title I funds on training, imposed by Senate Bill 734. Ten percent of the expenditure requirement may be met by applying designated leveraged resources.

To meet this requirement, Monterey County's combined total training expenditure requirement is \$908,838. Of this amount \$545,303 or 15% has been set-aside for training purposes. The remaining 10% will be met by applying match funds in the amount of \$363,535 from the employer's paid portion of on-the-job training contracts as well as customized training. See the table below for a breakdown:

25% Training Expenditure Requirement	Amount
Adult	\$252,737
Dislocated Worker	\$292,566
Total Combined Training Budget	\$545,303
Leveraged Amount 10%	\$363,535
Total Combined Training Budget and Leveraged 10%	\$908,838

As of April 30, 2013, Monterey County obligated a total of 80% in training dollars equaling \$332,410.95 and obligated leveraged funds equaling \$391,262.13 for a total of \$723,673.08 towards the minimum expenditure requirement of \$908,838, as shown below:

Total Training OBLIGATED	Amount
Adult Training Obligated	\$180,444.80
Dislocated Worker Training Obligated	\$151,966.15
Leveraged Amount 10%	\$391,262.13
YTD Training Obligated & Leveraged \$ as of 4/30/2013	\$723,673.08
Percent Obligated & Leveraged	80%

As of April 30, 2013, the actual amount of expenditures total 37% in training dollars equaling \$230,079 and leveraged funds equaling \$110,387.21 for a total of \$568,371.79 towards the minimum expenditure requirement of \$908,838, as shown below:

Total Training EXPENDED	Amount
Adult Training Expenditures	\$132,108
Dislocated Worker Training Expenditures	\$97,971
Leveraged Amount 10%	\$110,387.21
YTD Training Expenditures & Leveraged \$ as of 4/30/2013*	\$340,466.21
Balance	\$568,371.79
Percent Expended & Leveraged	37%

*Expenditures do not reflect fiscal claim for Shoreline for March 2013.

BUSINESS ITEM #4

Since the last Oversight Committee meeting in April, the numbers of Adult and Dislocated Worker training enrollments have increased from 116 to 131.

The majority of enrollments (82 or 63%) participated in the local labor force through the utilization of on-the-job training (OJT) opportunities, which means they received training by an employer while engaged in productive work on the job. The remaining enrollments (49 or 37%) were referred to training vendors on the Eligible Training Provider List (ETPL) to receive tuition reimbursement through the use of individual training accounts (ITA).

An additional 124 have been enrolled into individual training accounts under the Dislocated Worker Additional Assistance special project grant for a total training obligation of \$506,293.

The following is a breakdown of the training enrollments and obligated expenditures, to date:

2013 - Adult and Dislocated Worker (DW) - Training Contracts							
Grants	Training	Agency	# Enrolled	Obligated	Est. Avg Cost	OJT Leveraged \$	
ADULT	ITA	OET	19	\$ 77,416.29	\$ 4,074.54	\$ -	
ADULT	OJT	OET	1	\$ 5,760.00	\$ 5,760.00	\$ 2,880.00	
DW	ITA	OET	29	\$ 127,598.40	\$ 4,399.94	\$ -	
DW	OJT	OET	6	\$ 24,367.75	\$ 4,061.29	\$ 12,183.88	
ADULT	OJT	Turning Pt	40	\$ 43,290.25	\$ 1,082.26	\$ 21,645.13	
ADULT	OJT	Shoreline	35	\$ 52,278.26	\$ 1,493.66	\$ 26,139.13	
ADULT	ITA	Shoreline	1	\$ 1,700.00	\$ 1,700.00	\$ -	
SUBTOTAL			131	\$ 332,410.95		\$ 62,848.13	

2013 - All Other Training							
Grants	Training	Agency	# Enrolled	Obligated	Est. Avg Cost	DWAA Leveraged \$	
DWAA & DW Co-Enrolled	ITA	OET	84	\$ 328,414.00	\$ 3,909.69	\$ 328,414.00	
DWAA	ITA	Shoreline	40	\$ 177,879.00	\$ 4,446.98	\$ -	
WORKFORCE SOL	OJT	OET	21	\$ 42,132.89	\$ 2,006.33	\$ -	
AB109	OJT	OET	1	\$ 1,920.00		\$ -	
AB109	ITA	OET	1	\$ 4,956.00	\$ 4,956.00	\$ -	
SUBTOTAL			147	\$ 555,301.89		\$ 328,414.00	
TOTAL			278	\$ 887,712.84		\$ 391,262.13	

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD
FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD
SUBJECT: UPDATE ON THE LOCAL WORKFORCE INVESTMENT AREA BUDGET FOR PY 2012-13
DATE: MAY 9, 2013

INFORMATION:

At the Oversight Committee meeting on May 9, 2013, WIB staff plan to present an update on the Local Workforce Investment Area's (LWIA) Program Year budget for 2012-13.

The total budget is \$6,932,277. To date, 64% or \$4,455,359 has been expended, leaving a remaining balance of \$2,476,918.

ATTACHMENT:

Reference budget handout at meeting.

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: CONSIDER AND APPROVE THE LOCAL WORKFORCE INVESTMENT AREA BUDGET FOR
PY 2013-14

DATE: MAY 9, 2013

RECOMMENDATION:

It's recommended that the Oversight Committee consider and approve the Local Workforce Investment Area budget for Program Year 2013-14.

ATTACHMENT:

At the Oversight Committee meeting on May 9, 2013, WIB staff plan to present the budget. Reference the budget handout at meeting.

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: CONSIDER AND RECOMMEND THE STATUS OF THE WIA TITLE I ADULT SUBCONTRACTS WITH SHORELINE AND TURNING POINT DUE THE DEPARTMENT OF LABOR'S MANDATORY REDUCTIONS IMPACTING ALL WIA FUNDING LEVELS EFFECTIVE PROGRAM YEAR 2013-14.

DATE: MAY 9, 2013

RECOMMENDATION:

In light of the anticipated Department of Labor's mandatory reductions impacting all Workforce Investment Act (WIA) Title I funding levels effective Program Year 2013-14, it is recommended that the Oversight Committee consider and recommend the status of the WIA Title I Adult subcontracts with Shoreline Workforce Development Services and Turning Point of Central California and then forward the action to the Executive Committee.

INFORMATION AND DISCUSSION:

In Program Year 2012-13, the Monterey County Board of Supervisors approved the Monterey County Workforce Investment Board's recommendation to initiate WIA Title I Adult subcontracts with Shoreline and Turning Point to start on July 1, 2012 and end on June 30, 2013. The current subcontracts allows for an extension of up to two years beyond the initial one-year subcontract period pending the availability of WIA funds and acceptable subcontractor performance. The status of the current subcontractor's performance will be presented at the Oversight Committee meeting on May 9th, under agenda item #3. Program Year 2013-14 would be the last year the WIA Title I Adult subcontracts could be extended.

The Oversight Committee, Executive Committee and full WIB are required to decide if they wish to continue funding the existing WIA Adult subcontracts for a third and final year; develop a new Request for Proposals (RFP) with a different program design and contract deliverables; or not to subcontract adult services at all.

According to the original RFP, under section "1.1 Funds Available", it states in part:

"There are no set guidelines for the minimum amount of funding that can be requested. The County will determine funding amounts based on several factors including the total amount of dollars available, the quality of each collaborative proposal in meeting the criteria of the original RFP, anticipated success rates and return on investment, the CONTRACTOR(s) demonstrated ability to administer WIA funds, and on the availability of WIA funds. Funding amounts may increase or decrease during the contract period based on the funds available, and the CONTRACTOR(s) performance. Funding levels for requested programs are contingent upon the final WIA Title I allocations received from the US Department of Labor and the State of California."

AVAILABLE FUNDING:

Due to Federal Sequestration, it is anticipated that Monterey County will receive a severe reduction in WIA Title I Adult formula funds impacting PY 2013-14. The estimated amount of the reduction and impacts will be brought to the Oversight Committee meeting on May 9, 2013 for review.