



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 11, 2013

8:30-10:00am

Oversight Committee Members:

Mary Ann Leffel, Chair

- Al Davis
- Cesar Lara
- 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 June 20, 2013 Oversight Committee meeting.	
DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS:	
1. Receive a report on the WIA 25% Dislocated Worker Additional Assistance special project grant for PY 2012-13.	Joyce Aldrich
2. Receive a report on the WIA Adult and Dislocated Worker programs and activities for PY 2012-13 close-out and 3-year analysis.	Marleen Esquerra Wil Moore Rosie Chavez Terri Gallardo
3. Receive a report on the number of local WIA training placements and expenditures for 2012-13.	Marleen Esquerra
4. Update on the Local Workforce Investment Area budget for PY 2012-13.	Joyce Aldrich
ANNOUNCEMENTS OF EVENTS:	
SUBCOMMITTEE MEETINGS: Executive: 7/17/2013 – Shoreline, Marina Oversight: 8/8/2013 – Shoreline, Marina Youth: 9/10/2013 – Shoreline, Marina Business Services: 8/13/2013 – Marina Library	WIB MEETINGS: 8/7/2013: Salinas One Stop
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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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: JULY 11, 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 on June 20, 2013, the total number of enrollments have remained at 262 (142%) of the total plan goal of 185 with 134 (168%) enrolled into training.

As of June 15, 2013, the total amount expended is \$889,167 (89%) of the total grant project amount of \$999,847. Other funding streams will be used to cover any 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 show the number of plan vs. actual enrollments and expenditures:

DWAA Services	Total Plan	Total Actual	OET		Shoreline	
			Plan	Actual	Plan	Actual
Core & Intensive Registered Enrollments	185	262 (142%)	105	184	80	78
Training Enrollments	80	134 (168%)	45	93	35	41
Exits from the Program	185	10	105	14	80	4
Placed in Unsubsidized Employment	63.4%	TBD	70	0	55	0
Employment Retention Goal	80%	TBD				
Avg. Earnings Replacement	\$12,500	TBD				

Total Budget Expenditures	Total Plan	YTD Expended	% Expended	Balance
Program Salaries & Benefits	\$196,745	\$210,710	107%	-13,965
Services & Supplies	\$ 78,516	\$74,015	94%	4,501
Participant Costs	\$ 17,100	\$4,309	25%	12,791
Subcontractor Services	\$149,643	\$114,381	76%	35,262
Training Costs	\$412,901	\$339,281	82%	73,620
WIB Salary & Benefits	\$108,921	\$112,098	103%	-3,177
Admin Costs	\$ 36,022	\$34,373	95%	1,649
Total Budget Expenditures	\$999,847	\$889,167	89%	\$110,681

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: JULY 11, 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 June 15, 2013, Monterey County expended 92% of its WIA Adult funds and 76% of its Dislocated Worker funds, as outlined below:

WIA Budget	Adult	Dislocated Worker
Carry-In funds from PY 2011-12	\$0	\$385,270
PY 2012-13 Allocation	\$1,684,911	\$1,950,439
Total Budget	\$1,684,911	\$2,335,709
OET & Subcontract Program & Training Expenditures	\$1,381,821	\$1,484,482
WIB and Admin Expenditures	\$167,464	\$294,689
YTD Expenditures as of 6/15/2013*	\$1,549,285	\$1,779,171
Balance	\$135,626	\$556,538
Percent Expended	92%	76%

*Expenditures do not reflect fiscal claims for Shoreline and Turning Point for June 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 4th 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%	58.22%	87%	No	Yes
Retention Rate	75.0%	72.28%	96%	No	Yes
Average Earnings	\$10,500	\$10,538	100%	Yes	Yes
Dislocated Worker	Target Performance Level	Actual Performance Level	Local Success Level	Met 100% Goal?	Met 80% Target?
Entered Employment	63.4%	56.47%	89%	No	Yes
Retention Rate	80.0%	74.43%	93%	No	Yes
Average Earnings	\$12,500	\$14,192	114%	Yes	Yes

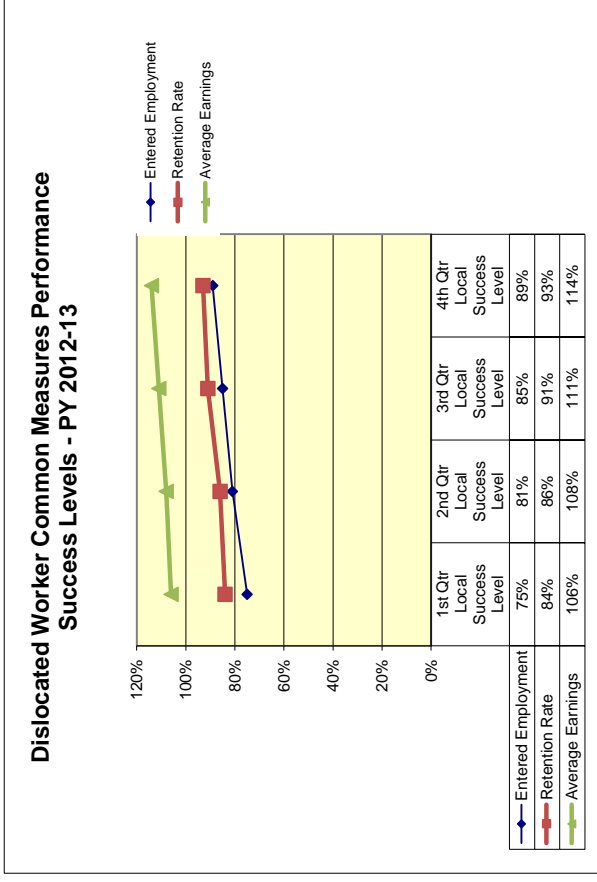
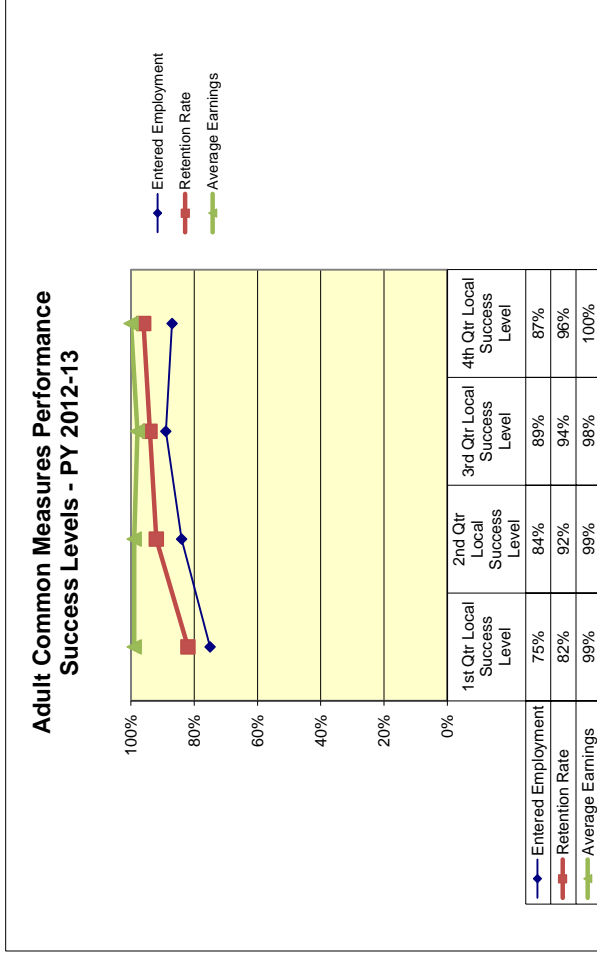
The following line graph demonstrates the increase in Common Measure performance success levels over the last four quarters for Program Year 2012-13.

BUSINESS ITEM #2

A summary close out of each individual program provider's performance will be presented at the meeting. A representative from each agency will be present to answer questions posed by the Oversight Committee regarding their program and performance.

A three year analysis of all services provided by provider will be presented at the Oversight Committee meeting on July 11, 2013.

Common Measures Performance Success Levels 1st - 4th Quarter Period Comparisons



1st - 3rd Quarter Period Comparisons - Data

Adult	Target Performance Level	4rd Qtr Actual Performance Level	1st Qtr Local Success Level	2nd Qtr Local Success Level	3rd Qtr Local Success Level	4th Qtr Local Success Level	Change in Qtr 4 Success Levels since last Oversight meeting:	Met 80% Target?	Met 100% Goal?
Entered Employment	67.00%	58.22%	75%	84%	89%	87%	Loss of 2%	Yes	No
Retention Rate	75.00%	72.28%	82%	92%	94%	96%	Gain of 2%	Yes	No
Average Earnings	\$10,500	\$10,538	99%	99%	98%	100%	Gain of 2%; diff of \$154	Yes	Yes

Dislocated Worker	Target Performance Level	4rd Qtr Actual Performance Level	1st Qtr Local Success Level	2nd Qtr Local Success Level	3rd Qtr Local Success Level	4th Qtr Local Success Level	Change in Qtr 4 Success Levels since last Oversight meeting:	Met 80% Target?	Met 100% Goal?
Entered Employment	63.40%	56.47%	75%	81%	85%	89%	Gain of 4%	Yes	No
Retention Rate	80.00%	74.43%	84%	86%	91%	93%	Gain of 2%	Yes	No
Average Earnings	\$12,500	\$14,192	106%	108%	111%	114%	Gain of 3%; diff of \$375	Yes	Yes

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: JULY 11, 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 June 15, 2013, Monterey County obligated a total of \$461,296.57 (\$195,720.92 + \$265,575.65) in training dollars and leveraged funds equaling \$363,535 (max 10%) for a total of \$824,831.57 towards the minimum expenditure requirement of \$908,838, as shown below:

Total Training OBLIGATED	Amount
Adult Training Obligated	\$195,720.92
Dislocated Worker Training Obligated	\$265,575.65
Leveraged Amount 10%	(max) \$363,535.00
YTD Training Obligated & Leveraged \$ as of 6/15/2013	\$824,831.57
Percent Obligated & Leveraged	91%

As of June 15, 2013, the actual amount of expenditures total 64.55% in training dollars equaling \$329,889 and leveraged funds equaling \$256,754.23 for a total of \$586,643.23 (64.55%) towards the minimum expenditure requirement of \$908,838, as shown below:

Total Training EXPENDED	Amount
Adult Training Expenditures	\$170,167.00
Dislocated Worker Training Expenditures	\$159,722.00
Leveraged Amount 10%	\$256,754.23
YTD Training Expenditures & Leveraged \$ as of 6/15/2013*	\$586,643.23
Balance	\$322,194.77
Percent Expended & Leveraged	64.55%

*Expenditures do not reflect fiscal claim for subcontractors for June 2013.

BUSINESS ITEM #3

Since the last Oversight Committee meeting in June, the number of Adult and Dislocated Worker training enrollments have remained the same at 182.

The majority of enrollments (99 or 54%) were referred to training vendors on the Eligible Training Provider List (ETPL) to receive tuition reimbursement through the use of individual training accounts (ITA). While the remaining enrollments (83 or 46%) 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.

A total of 134 have been enrolled into individual training accounts under the Dislocated Worker Additional Assistance special project grant for a total training obligation of \$536,777.

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	23	\$ 88,962.29	\$ 3,867.93	\$ -
ADULT	OJT	OET	1	\$ 5,760.00	\$ 5,760.00	\$ 2,880.00
DW	ITA	OET	75	\$ 334,097.90	\$ 4,454.64	\$ -
DW	OJT	OET	7	\$ 31,477.75	\$ 4,496.82	\$ 15,738.88
ADULT	OJT	Turning Pt	40	\$ 47,044.12	\$ 1,176.10	\$ 23,522.06
ADULT	OJT	Shoreline	35	\$ 52,254.51	\$ 1,492.99	\$ 26,127.26
ADULT	ITA	Shoreline	1	\$ 1,700.00	\$ 1,700.00	\$ -
SUBTOTAL			182	\$ 561,296.57		\$ 68,268.19

2013 - All Other Training						
Grants	Training	Agency	# Enrolled	Obligated	Est. Avg Cost	DWAA Leveraged \$
DWAA & DW Co-Enrolled	ITA	OET	93	\$ 361,378.04	\$ 3,885.79	\$ 361,378.04
DWAA	ITA	Shoreline	41	\$ 175,399.00	\$ 1,871.78	
WORKFORCE SOL	OJT	OET	22	\$ 41,179.14	\$ 4,278.02	
AB109	OJT	OET	1	\$ 1,920.00	\$ 1,920.00	
AB109	ITA	OET	1	\$ 4,956.00	\$ 4,956.00	
SUBTOTAL			158	\$ 584,832.18		\$ 361,378.04

TOTAL			340	\$ 1,146,128.75		\$ 429,646.23
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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: JULY 11, 2013

INFORMATION:

At the Oversight Committee meeting on July 11, 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 \$7,339,907. To date, 80% or \$5,856,591 has been expended, leaving a remaining balance of \$1,483,316.

ATTACHMENT:

Reference budget handout at meeting.