



**Executive Committee Members:**

*Erik Cushman, Chair*

Anthony Aniello

Cesar Lara

Diana Carrillo

Mary Ann Leffel

Dr. Willard Lewallen

Dave Potter

**Monterey County Workforce Investment Board (WIB)**

**Joyce Aldrich,**  
*WIB Executive Director*

730 La Guardia Street  
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# MONTEREY COUNTY ECONOMIC DEVELOPMENT

ERIK CUSHMAN, WIB CHAIR

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

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

**Wednesday, July 16, 2014, 8:00 am**

### AGENDA

<b>CALL TO ORDER/INTRODUCTIONS:</b>	ERIK CUSHMAN, CHAIR
<b>CHANGES TO AGENDA:</b>	
<b>PUBLIC COMMENT:</b>	
<b>SUBCOMMITTEE CHAIR REPORTS:</b>	ERIK CUSHMAN
<ul style="list-style-type: none"> <li>▪ <b>OVERSIGHT:</b> Mary Ann Leffel</li> <li>▪ <b>YOUTH COUNCIL:</b> Diana Carrillo</li> </ul>	
<b>CONSENT CALENDAR:</b>	ERIK CUSHMAN
1. <b>ACTION:</b> Approve minutes from May 21 2014.	
2. <b>ACTION:</b> Concur with the July 8, 2014 Youth Council action to approve the FINAL Workforce Investment Act (WIA) Title I Youth Program Monitoring Report for Program Year 2013-14 for the Santa Cruz County Office of Education.	
3. <b>ACTION:</b> Concur with the July 8, 2014 Youth Council action to approve the FINAL Workforce Investment Act (WIA) Title I Youth Program Monitoring Report for Program Year 2013-14 for Turning Point of Central California.	
4. <b>ACTION:</b> Concur with the July 10, 2014 Oversight Committee action to approve the FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report for Program Year 2013-14 for Turning Point of Central California.	
5. <b>ACTION:</b> Concur with the July 10, 2014 Oversight Committee action to approve the FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report for Program Year 2013-14 for Shoreline Workforce Development Services.	
<b>DISCUSSION/REVIEW OF BUSINESS CALENDAR ACTION ITEMS:</b>	
1. <b>ACTION:</b> Consider approval of submission of the Workforce Innovation Fund (WIF) Grant to the Department of Labor Employment and Training Administration (DOL ETA) to serve most at-risk youth ages 16-21. Submit to full board at their August 6, 2014 meeting for further approvals. Should the grant be awarded, the proposal will be placed on the Board of Supervisors agenda for final approval to accept the award.	JOYCE ALDRICH
2. Update on the Local WIA Budget for PY 2013-14.	RUBEN TRUJILLO
3. Update on the WIB's Strategic Local Plan.	JOYCE ALDRICH
4. Receive the Director's Report: <ul style="list-style-type: none"> <li>▪ Bill H.R. 803</li> <li>▪ CWA Executive Committee</li> <li>▪ Work Readiness Communities Academy</li> <li>▪ CWA Retreat.</li> </ul>	JOYCE ALDRICH
5. Review and discuss the DRAFT WIB Agenda in preparation for the August 6, 2014 meeting.	ERIK CUSHMAN
<b>ANNOUNCEMENTS OF EVENTS:</b>	



**Executive Committee  
Members:**

*Erik Cushman, Chair*

Anthony Aniello

Cesar Lara

Diana Carrillo

Mary Ann Leffel

Dr. Willard Lewallen

Dave Potter

## MONTEREY COUNTY ECONOMIC DEVELOPMENT

### ERIK CUSHMAN, WIB CHAIR

**SUBCOMMITTEE MEETINGS:**

Business Services: 08/12/2014; Marina Library

Executive: 08/20/2014; Shoreline, Marina

Youth Council: 09/09/2014; Shoreline, Marina

Oversight: 09/11/2014; Shoreline, Marina

**WIB MEETING:**

August 6, 2014; Marina Library

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

**Monterey County  
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**UNADOPTED**

Monterey County Workforce Investment Board  
**Executive Committee**  
Shoreline Workforce Development  
**Wednesday, May 21, 2014**

**Members Present:** Erik Cushman (Chair), Diana Carrillo, Cesar Lara, Mary Ann Leffel, Dr. Willard Lewallen

**Members Absent:** Anthony Aniello and Dave Potter

**Staff Present:** Joyce Aldrich, Marleen Esquerra and Flor Galvan

**Others Present:** Deborah Carrillo, Rebecca Cenicerros, Wil Moore, Ginger Pierce, Joanne Webster and Pearl Sanchez

**Call to Order/Introductions:** Mr. Cushman called the meeting to order at 8:13 a.m. and asked for introductions. A quorum was established.

**Changes to Agenda:** Mrs. Aldrich asked that Consent Action Item #3 under the Business Calendar section be moved on the agenda for discussion after item #2 under Appointments/Resignations.

**Public Comment:** None

**Subcommittee Chair Reports:**

**Business Committee:** Mrs. Aldrich reported that a presentation by the Encore Recycling Plant President, General Manager and Plant Manager was held at the May 2014 Business Services Committee meeting. The presentation was well received by the members. She also reported that Encore was delighted with the support they received from the Business Services Team and will continue to utilize them for future recruitments.

**Oversight:** Ms. Leffel reported that the items that were discussed or disapproved at the Oversight Committee meeting are brought before the Executive Committee today for approval and further discussion.

**Youth Council:** Ms. Carrillo reported that the last two Youth Council meetings have not occurred due to the lack of a quorum. She also reported that the council is reviewing possible alternative dates to hold meetings to accommodate everyone's schedule and to ensure a quorum is met.

**Consent Calendar:**

1. **Action: Approve minutes from January 15, 2014.**
2. **Action: Concur with the May 8, 2014 Oversight Committee action to approve the Workforce Investment Act (WIA) Fiscal and Procurement Review Final Monitoring Report from the State Compliance Review Office for Program Year 2013-14.**
4. **Action: Concur with May 8, 2014 Oversight Committee action to approve Revised WIB Polices #2004-03, 2005-05, 2005-10, 2007-04, 2010-01, 2011-02, 2011-03, and 2011-04.**

**Motion:** Ms. Leffel motioned to pull Consent Item #3 for further discussion and moved it on the agenda after item #2 under Appointments/Resignations.

**Second:** Ms. Carrillo

**Approved unanimously by those in attendance**

**Motion:** Ms. Leffel motioned to approve the consent Calendar with the exception of Consent Item #3.

**Second:** Ms. Carrillo

**Approved unanimously by those in attendance**

**Appointments/Resignations:**

1. **Action: Consider and approve the resignation of Rick Deraiche, representing Employment Development Department (AJCC Partner) from the Workforce Investment Board.**
2. **Action: Consider and approve the appointment of Yuko Duckworth, representing Employment Development Department (AJCC Partner) to the Workforce Investment Board and forward to full WIB for final approval before submitting to the Board of Supervisors for appointment.**

**Motion:** Ms. Leffel motioned to approve Items #1 and 2 as stated.

**Second:** Ms. Carrillo

**Approved unanimously by those in attendance**

3. **Consent Calendar Action Item #3: Concur with the May 8, 2014 Oversight Committee action to approve the Request for Proposal (RFP) Selection Committee funding recommendation for WIA Title I Adult services totaling \$175,000 and move to Workforce Investment Board for consideration prior to submitting to the Board of Supervisors for final approval at their June 24, 2014 meeting.** Ms.

Webster reported that the proposals were excellent and the bidders had many of the same components. She reported that the decision to award Shoreline the contract was due to their physical presence throughout Monterey County. Ms. Pierce stated that with the State encouraging WIB's to develop regionalized partnerships Shoreline's physical presence throughout the surrounding counties (i.e. Marina, Salinas, San Luis Obispo, and Watsonville) was a key cause for the decision.

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

**Second:** Ms. Leffel

**Approved unanimously by those in attendance**

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

1. **Action: Approve the FINAL Workforce Investment Act (WIA) Governor's 25% Dislocated Worker Additional Assistance (DWAA) Special Project Monitoring Report, PY 2012-13 for Office of Employment Training.** Mrs. Aldrich reported that the Oversight Committee felt as though the reports did not show current participants placed into unsubsidized employment upon exit. However, Ms. Aldrich explained that the monitoring review period was a snapshot in time and it was too soon to have a clear picture of the total placements for the grant. She also reported that she received data from OET staff that shows sixty participants have been placed in unsubsidized employment. OET is also awaiting base wage file information from the State to report placement into unsubsidized employment for an additional nine participants. Ms. Aldrich stated the report has been revised to include the most current placement information.

**Motion:** Ms. Leffel motioned to approve the action with the provision that staff ensure the monitoring report includes the current placement into unsubsidized employment performance data.

**Second:** Mr. Lara

**Opposed:** Mr. Cushman

**Approved by those in attendance**

2. **Action: Approve the Final WIA Governor's 25% DWAA Special Project Monitoring Report, PY 2012-13 for Shoreline Workforce Development Services.** Mrs. Aldrich reported that Shoreline currently has fifteen participants placed in unsubsidized employment. Ms. Aldrich stated the report has been revised to include the most current placement information.

**Motion:** Ms. Leffel motioned to approve the action with the provision that staff ensure the monitoring report includes the current placement into unsubsidized employment performance data.

**Second:** Ms. Carrillo

**Approved unanimously by those in attendance**

3. **Consider the Request for Proposal (RFP) Selection Committee funding recommendation for WIA Title I Youth Services for PY 2014-15 in the amount of \$110,000, move to the Workforce Investment Board for consideration prior to submitting to the Board of Supervisors for final approval at their June 24, 2014 meeting.** Mrs. Aldrich reported that the RFP was released on March 31, 2014 with a closing date of April 29, 2014. She also reported that the County Contracts/Purchasing Department and WIB staff conducted a Bidders meeting on April 14, 2014 to include a question and answer process. She reported that the two submitted proposals were given to the Selection Committee who reviewed and interviewed the bidders.

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

**Second:** Mr. Lara

**Approved unanimously by those in attendance**

4. **Action: Consider and approve the revised WIB Adult, Dislocated Worker and Youth policies.** Mrs. Aldrich reported that the Oversight Committee requested that two policies be brought before the Executive Committee for further discussion. The two policies include #2005-08 Industry Clusters and #2011-05 On-the-Job Training. She reported that the committee requested that consideration be made that Construction

be added as one of the Priority Industry Sectors. Mrs. Aldrich reported that the State has approved our Local Plan and the request to add Construction cannot be made at this time; however Construction can fall under the 25% training exception. She also reported that the Oversight Committee requested to add language that states that WIB staff will review bi-yearly with Service Providers and adjust annually if needed to the On-the-Job Training policy.

**Motion:** Mr. Lara motioned to accept the action with the recommended changes.

**Second:** Ms. Carrillo

**Abstention:** Ms. Leffel

**Approved by those in attendance**

5. **Action: Review and approve updated WIA Budget for PY 2013-14.** Mrs. Aldrich reported on the LWIA Budget of all WIA and Non-WIA funds along with the actual expenditures and percentages.

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

**Second:** Ms. Leffel

**Approved unanimously by those in attendance**

6. **Consider approving submission of Workforce Accelerator Grant Proposal to California Workforce Investment Board. Upon notice of award proposal will be placed on Board of Supervisors Agenda for final approval to accept award.** Mrs. Aldrich reported that she would like to apply for the Workforce Accelerator Grant under the Disconnected Youth category. She reported that funds would go toward a pilot project in collaboration with the Department of Social Services to serve their TANF Youth with the purpose toward breaking the generational cycle of TANF recipients needing public assistance.

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

**Second:** Ms. Carrillo

**Approved unanimously by those in attendance**

7. **Receive PY 2014-15 WIA Formula Allocations from State of California Employment Development Department.** Mrs. Aldrich reported on the WIA formula allocations and stated that the WIB received a \$409,000 reduction from the previous program year. She also reported that the information was received from the State prior to the submission of the current year's budget to the County Administrative Office therefore two positions were lost due to the reduction.

8. **Review and discuss WIB Retreat Strategies Update for PY 2014-15.** Mrs. Aldrich reported that staff is progressing forward in meeting the goals that were proposed by the full WIB.

9. **Review and discuss the DRAFT WIB Agenda in preparation for June 4, 2014 meeting.** Mrs. Aldrich reported that the subcontractor's contracts will be presented on the Agenda.

10. **Receive Director's Report.** Mrs. Aldrich reported that the WIB received the second round of funding for the Dislocated Worker Additional Assistance subgrant which will end September 30, 2015. She also reported that the WIB has not received word on the Career Pathways Trust Fund grant that was applied for in collaboration with Hartnell College. She reported that the Prop 39 grant application was submitted and funded. She reported that the Work Readiness Communities Academy was interesting and she received great ideas from other WIBs.

**Announcement of Events:** Ms. Leffel reported that the Regional Critical Conversation Conference will take place on June 24, 2014 at the Monterey Marriott from 9am-3pm.

**Adjournment:** Mr. Cushman adjourned the meeting at 9:43am.

**Motion:** Ms. Leffel motioned to adjourn the meeting.

**Second:** Mr. Lara

**Approved unanimously by those in attendance**

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD EXECUTIVE COMMITTEE

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

**SUBJECT:** CONCUR WITH THE JULY 8, 2014 YOUTH COUNCIL ACTION TO APPROVE THE FINAL WORKFORCE INVESTMENT ACT (WIA) TITLE I YOUTH PROGRAM MONITORING REPORT FOR PROGRAM YEAR 2013-14 FOR THE SANTA CRUZ COUNTY OFFICE OF EDUCATION

**DATE:** JULY 16, 2014

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**RECOMMENDATION:**

It is recommended that the Executive Committee concur with the July 8, 2014 Youth Council action to approve the FINAL Workforce Investment Act (WIA) Title I Youth Program Monitoring Report for Program Year 2013-14 for the Santa Cruz County Office of Education (SCCOE).

**BACKGROUND:**

The Monterey County Board of Supervisors approved the WIA youth subcontract with SCCOE in the amount of \$111,331, for Program Year (PY) October 1, 2013 to June 30, 2014. The contract provides services to 43 new WIA eligible, in-school and out-of-school youth participants, ages 16-21, with an emphasis on enrolling youth in the North and West regions of Monterey County. The goal is to enroll all youth into six weeks of Hospitality Tourism and Customer Service (HTCS) classroom training by March 31, 2014, then enroll thirty-eight (38) of those youth who successfully complete the certified HTCS classroom training into paid work experience.

**DISCUSSION:**

This is to report the results of the WIB compliance monitoring review of the activities performed by SCCOE for Program Year 2013-14. The review covered the period of October 1, 2013 to January 31, 2014.

Although there were no findings, program staff was advised of the following observations:

- Timeliness of Claims for Reimbursement: Claims and reimbursements have been submitted late for processing.
- As a follow-up to the Monterey County's response to the State of California Employment Development Department's Compliance Review Office on all open findings and local monitoring reviews of previous observations, SCCOE's program was reviewed and found to be in compliance.

WIB staff sent a draft monitoring letter to SCCOE on April 25, 2014, addressing the observations noted above. The protocols and monitoring guidelines provide up to 15 working days after the receipt of the draft monitoring report for SCCOE to submit a response. No response was received to the draft report; therefore the report stands as final.

**ATTACHMENT:**

FINAL WIA Title I Youth Program Monitoring Report for Program Year 2013-14 for SCCOE

# MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT

## Monterey County Workforce Investment Board

ERIK CUSHMAN, CHAIR

JOYCE ALDRICH, WIB EXECUTIVE DIRECTOR



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May 23, 2014

Jo Ann Allen, Manager of Student Support Services  
Santa Cruz County Office of Education  
400 Encinal Street  
Santa Cruz, CA 95060

**RE:** FINAL Workforce Investment Act (WIA) Title I Youth Program Monitoring Report, Program Year 2013-14

This is to report the results of our subcontract compliance monitoring for the Workforce Investment Act (WIA) Youth Title I activities performed by the Santa Cruz County Office of Education – Sueños Collaborative (SCCOE) for program year 2013-14. The fiscal review covered the period of October 1, 2013 – December 31, 2013 and the program review covered the period of October 1, 2013 - January 31, 2014. WIB staff Marleen Esquerro conducted the monitoring review.

The purpose of this review was to evaluate SCCOE's compliance with the provisions of WIA, associated regulations and directives, local policies, and the provisions of their contract with the Monterey County Workforce Investment Board. Information collected for this report was provided through a desk review of SCCOE's expenditures and enrollments; interviews with SCCOE staff, participants and employers, as well as the results of a participant case file review. WIB staff also performed a follow-up on all open findings identified by the State's Compliance Review Office.

**Monitoring Date:** March 18, 2014 at 249 10<sup>th</sup> Street, Marina, CA

**Background:** The Monterey County Board of Supervisors approved the WIA youth subcontract with SCCOE in the amount of \$111,331, for Program Year (PY) October 1, 2013 to June 30, 2014. The contract provides services to 43 new WIA eligible, in-school and out-of-school youth participants, ages 16-21, with an emphasis on enrolling youth in the North and West regions of Monterey County. The goal is to enroll all youth into six weeks of Hospitality Tourism and Customer Service (HTCS) classroom training by March 31, 2014, then enroll thirty-eight (38) of those youth who successfully complete the certified HTCS classroom training into paid work experience.

### I. **DESK REVIEW:**

Table 1: SCCOE's fiscal performance was reviewed for compliance with the contract plan for the quarter period ending December 31, 2013. SCCOE's total actual expenditures are \$28,984 (26%) of their planned budget. Work experience expenditures are \$4,826 (34%), staff salaries and benefit expenditures are \$23,903 (115%), and supportive service expenditures are \$21 of plan.

#### i. **Expenditures – Table 1:**

Program Year 2013-14	Work Experience	Staff Salaries & Benefits	Supportive Services	Total Contract Plan vs. Actual
Dec 2013 Plan	\$14,000	\$20,764	\$2,384	\$111,331
Dec 2013 Actual	\$4,826	\$23,903	\$21	\$28,984
% of Plan	34%	115%	-	26%

Table 2: As of January 31, 2014, SCCOE enrolled 56% (14) of their planned new enrollments and 50% (5) of their planned work experience enrollments. At the time of the review, it was determined that SCCOE is behind on meeting their work experience enrollments goal because many of their youth have yet to complete the certified HTCS six-week classroom training. Since the review, SCCOE has conducted outreach and recruitment activities on-site at local high schools in West and North County areas and also met with representatives from non-profit agencies that serve foster care youth in an effort to meet their enrollment goals and planned expenditures in the near-term. SCCOE’s geographic enrollments are higher than planned for the North and West County areas.

As of the 3<sup>rd</sup> Quarter period, SCCOE exceeded the 80% minimum target levels, for the number of enrollments achieved to date, for all the Common Measures performance goals with local success levels at 90% for youth placed in employment or education, 141% for the attainment of a degree or certificate, and 164% for youth literacy and numeracy gains.

Table 3: Services to foster care youth are well above plan, while the other target populations including: offenders, disabled individuals, out-of-school youth, temporary assistance for needy families (TANF) recipients and homeless youth are well below plan.

**ii. Enrollments – Table 2:**

Program Year 2013-14	New Enrollments	Work Experience	Geographic Areas Served (Emphasis on North & West regions of Monterey County)			
			Central	*North	South	*West
Jan 2014 Plan	25	10	55%	11%	18%	16%
Jan 2014 Actual	14	5	-	7	-	7
% of Plan	56%	50%	-	50%	-	50%

*\*Geographical area of emphasis is to enroll youth in the North and West regions of Monterey County.*

**iii. Enrollments – Table 3:**

Program Year 2013-14	Target Populations Served					
	Offender 10%	Disabled 10%	Out of School 30%	Foster Youth 5%	TANF 20%	Homeless 2%
Jan 2014 Plan	10%	10%	30%	5%	20%	2%
Jan 2014 Actual	1	1	3	3	2	0
% of Plan	7%	7%	21%	21%	14%	0%

**I. FIELD REVIEW:**

Four youth participant case files were randomly selected and reviewed. The youth case files were reviewed to ensure compliance with work experience requirements and WIA regulations. The file monitoring conducted by WIB staff included a review of eligibility, assessment, work experience compliance, supportive services, timesheets, and performance evaluations. The files were well organized with checklists and included all the necessary eligibility documentation.

**i. Participant, Employer and Staff Interviews**

WIB staff met with SCCOE staff and interviewed a selection of youth participants and employers during the period of April 1 – 7, 2014. All participants and employers were very complimentary of the SCCOE staff and for the opportunity to have participated in the work experience program. The youth participants that completed the HTCS Academy were pleased to receive an industry recognized certificate and 5 credits. Their school officials were also notified of the credits achieved.

**ii. Financial Accounting Internal Controls**

A sample of the fiscal data in the participant case files were reviewed to ensure compliance with work experience requirements and WIA regulations. The monitoring included the review of adequate documentation of supportive services, timesheets and timely posting and adherence to established fiscal procedures and WIB policies.



## II. CONCLUSION:

The results of the performance review, and interviews with SCCOE staff indicate that SCCOE is satisfactorily meeting their PY 2013-14 youth subcontract provisions. An exit interview was conducted on March 18, 2014 with Ms. Jo Ann Allen and Mr. Miguel Hernandez. Although there were no findings, program staff was advised of the following observations:

### i. **Observations:**

1. **Timeliness of Claims for Reimbursement:** Claims and reimbursements have been submitted late for processing.

**Recommendation:** Per the subcontractor agreement Exhibit D – Other Terms and Conditions, section 6.07. Payment of Authorized Expenditures, it states in part: “Financial reports and invoices are due to the fiscal department by the 15th working day of each month and shall include all obligations, expenditures and accruals incurred during the previous month, unless otherwise specified by the WIB.” SCCOE **must** comply with the subcontract stipulations and submit all reports and invoices as agreed upon in the contract.

### 2. **Follow-up – State and Local Monitoring:**

As a follow-up to the Monterey County’s response to the State of California Employment Development Department’s Compliance Review Office on all open findings and local monitoring reviews of previous observations, SCCOE’s program was reviewed and found to be in compliance with the following:

- Developed and implemented a supportive services tracking log to ensure adequate safeguards are in place, prior to the payment of all supportive services.
- Prior to the payment of all supportive services, SCCOE ensures that participant case files maintain accurate records, and the Virtual One Stop (VOS) and Job Training Automation (JTA) systems are updated with the appropriate activity codes.
- Prior to enrollment, SCCOE obtains proof and documents income eligibility.
- SCCOE ensures follow-up contact is made upon exit to determine a client’s employment or educational status after exiting the WIA program.
- SCCOE enters case notes into VOS in a timely fashion as services are being provided to individuals to ensure there are no case note gaps.

Because the methodology for the WIB staff monitoring review included sample testing, this report is not a comprehensive assessment of all the areas included as part of SCCOE’s contract, program and fiscal operations. It is SCCOE’s responsibility to ensure that their systems, program, and related activities comply with the WIA related regulations and applicable State directives. Therefore, any deficiencies identified in subsequent reviews, such as an audit, would remain SCCOE’s responsibility.

WIB staff sent a draft monitoring letter to SCCOE on April 25, 2014, addressing the observations noted above. The protocols and monitoring guidelines provide up to 15 working days after the receipt of the draft monitoring report for SCCOE to submit a response. No response was received to the draft report; therefore the report stands as final.

Please extend our appreciation to your staff for their cooperation and assistance during our review. If you have any questions regarding this report or the review that was conducted, please contact me at (831) 759-6644.

Sincerely,



Joyce Aldrich  
Executive Director  
Monterey County Workforce Investment Board

cc: Marleen Esquerra, WIB Management Analyst  
Beatriz Munoz, SCCOE  
Miguel Hernandez, SCCOE

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD EXECUTIVE COMMITTEE

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

**SUBJECT:** CONCUR WITH THE JULY 8, 2014 YOUTH COUNCIL ACTION TO APPROVE THE FINAL WORKFORCE INVESTMENT ACT (WIA) TITLE I YOUTH PROGRAM MONITORING REPORT FOR PROGRAM YEAR 2013-14 FOR TURNING POINT OF CENTRAL CALIFORNIA

**DATE:** JULY 16, 2014

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**RECOMMENDATION:**

It is recommended that the Executive Committee concur with the July 8, 2014 Youth Council action to approve the FINAL Workforce Investment Act (WIA) Title I Youth Program Monitoring Report for Program Year 2013-14 for Turning Point of Central California.

**BACKGROUND:**

The Monterey County Board of Supervisors approved the WIA youth subcontract with Turning Point in the amount of \$120,609, for Program Year (PY) October 1, 2013 to June 30, 2014. The contract provides occupational skills training, leadership development, mentoring, guidance and counseling and supportive services to forty-five (45) WIA eligible youth (16 to 21) who face multiple barriers to employment and are low-income. Thirty-two (32) will receive paid and unpaid work experience opportunities. The geographical area of emphasis is to enroll youth in the Central and South regions of Monterey County.

**DISCUSSION:**

This is to report the results of the WIB compliance monitoring review of the activities performed by Turning Point for Program Year 2013-14. The review covered the period of October 1, 2013 to January 31, 2014.

Although there were no findings, program staff was advised of the following:

- As a follow-up to the Monterey County's response to the State of California Employment Development Department's Compliance Review Office on all open findings and local monitoring reviews of previous observations, Turning Point's program was reviewed and found to be in compliance.

WIB staff sent a draft monitoring letter to Turning Point on April 25, 2014. The protocols and monitoring guidelines provide up to 15 working days after the receipt of the draft monitoring report for Turning Point to submit a response. No response was received to the draft report; therefore the report stands as final.

**ATTACHMENT:**

FINAL WIA Title I Youth Program Monitoring Report for Program Year 2013-14 for Turning Point

# MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT

## Monterey County Workforce Investment Board

ERIK CUSHMAN, CHAIR

JOYCE ALDRICH, WIB EXECUTIVE DIRECTOR



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May 23, 2014

Deborah Carrillo, Executive Director  
Turning Point of Central California  
116 East San Luis Street  
Salinas, CA 93901

**RE:** FINAL Workforce Investment Act (WIA) Title I Youth Program Monitoring Report, Program Year 2013-14

This is to report the results of our subcontract compliance monitoring for the Workforce Investment Act (WIA) Youth Title I activities performed by Turning Point of Central California (Turning Point) for program year 2013-14. The fiscal review covered the period of October 1, 2013 – December 31, 2013 and the program review covered the period of October 1, 2013 - January 31, 2014. WIB staff Marleen Esquerra conducted the monitoring review.

The purpose of this review was to evaluate Turning Point's compliance with the provisions of WIA, associated regulations and directives, local policies, and the provisions of their contract with the Monterey County Workforce Investment Board. Information collected for this report was provided through a desk review of Turning Point's expenditures and enrollments; interviews with Turning Point staff, participants, as well as the results of a participant case file review. WIB staff also performed a follow-up on all open findings identified by the State's Compliance Review Office.

**Monitoring Dates:** March 20-21, 2014 at 111 East San Luis Street, Salinas, CA.

**Background:** The Monterey County Board of Supervisors approved the WIA youth subcontract with Turning Point in the amount of \$120,609, for Program Year (PY) October 1, 2013 to June 30, 2014. The contract provides occupational skills training, leadership development, mentoring, guidance and counseling and supportive services to forty-five (45) WIA eligible youth (16 to 21) who face multiple barriers to employment and are low-income. Thirty-two (32) will receive paid and unpaid work experience opportunities. The geographical area of emphasis is to enroll youth in the Central and South regions of Monterey County.

### I. **DESK REVIEW:**

Table 1: Turning Point's performance was reviewed for compliance with the contract plan for the quarter period ending December 31, 2013. Turning Point's total actual expenditures are \$28,103 (47%) of its planned budget. Work experience expenditures are \$2,317 (29%), staff salaries and benefits expenditures are \$15,469 (76%), and supportive service expenditures are \$3,536 (65%) of plan.

#### i. **Expenditures – Table 1:**

Program Year 2013-14	Work Experience	Staff Salaries & Benefits	Supportive Services	Total Contract
Dec 2013 Plan	\$8,000	\$20,384	\$5,443	\$60,305
Dec 2013 Actual	\$2,317	\$15,469	\$3,536	\$28,103
% of Plan	29%	76%	65%	47%

Table 2: As of January 31, 2014, Turning Point enrolled 116% (36) of their planned new enrollments and 118% (26) of their planned work experience enrollments. Turning Point focuses its recruitment efforts on youth from all geographic regions of the county, with an emphasis on serving youth in the Central and South County areas. Turning Point’s geographic enrollments are higher than planned for the Central and South County areas.

As of the 3<sup>rd</sup> Quarter period, Turning Point exceeded the 80% minimum target levels, for the number of enrollments achieved to date, for two of the Common Measures performance goals with local success levels at 89% for youth placed in employment or education and 144% for the attainment of a degree or certificate. At the time of the review, there was no data available to report on Turning Point’s literacy and numeracy gains.

Table 3: Turning Point exceeded the minimum WIB established target population goals for all target groups except for out-of-school youth.

**ii. Enrollments – Table 2:**

Program Year 2013-14	New Enrollments	Work Experience	Geographic Areas Served Min Goal = 10%			
			Central*	North	South*	West
Jan 2014 Plan	31	22	55%	11%	18%	16%
Jan 2014 Actual	36	26	24	2	8	2
% of Plan	116%	118%	67%	6%	22%	6%

*\*Geographical area of emphasis is to enroll youth in the Central and South regions of Monterey County.*

**iii. Enrollments – Table 3:**

Program Year 2013-14	Target Populations Served					
	Offender	Disabled	Out of School	Foster Youth	TANF	Homeless
Jan 2014 Plan	40%	29%	12%	8%	6%	5%
Jan 2014 Actual	24	31	3	8	6	5
% of Plan	67%	86%	8%	22%	17%	14%

**I. FIELD REVIEW:**

Eight youth participant case files were randomly selected and reviewed. The youth case files were reviewed to ensure compliance with work experience requirements and WIA regulations. The file monitoring conducted by WIB staff included a review of eligibility, assessment, work experience compliance, supportive services, timesheets, and performance evaluations. The files were well organized with checklists and included all the necessary eligibility documentation.

**i. Participant, Employer and Staff Interviews**

WIB staff met with Turning Point staff and interviewed a selection of youth participants and employers on March 20, 2014. All participants and employers were very complimentary of the Turning Point youth staff and for the opportunity to have participated in the work experience program. The youth learned interview techniques, how to dress for success, how to develop a resume, search for jobs and be successful on the job.

**i. Financial Accounting Internal Controls**

A sample of the fiscal data in the participant case files were reviewed to ensure compliance with work experience requirements and WIA regulations. The monitoring included the review of adequate documentation of supportive services, timesheets and timely posting and adherence to established fiscal procedures and WIB policies.

**II. CONCLUSION:**

The results of the performance review, and interviews with Turning Point staff, participants, and employers indicate that Turning Point is satisfactorily meeting their PY 2013-14 youth subcontract

provisions. An exit interview was conducted on Friday, March 21, 2014 with Turning Point Staff Ms. Rosie Chavez, Ms. Deborah Carrillo and Ms. Pearl Sanchez. Although there were no findings, program staff was advised of the following observations:

**Follow-up – State and Local Monitoring:**

As a follow-up to the Monterey County’s response to the State of California Employment Development Department’s Compliance Review Office on all open findings and local monitoring reviews of previous observations, Turning Point’s program was reviewed and found to be in compliance with the following:

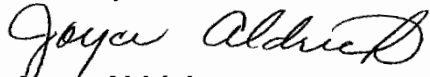
- Developed and implemented a supportive services tracking log to ensure adequate safeguards are in place, prior to the payment of all supportive services – to include justification on the Individual Service Strategy (ISS) plan on how supportive services are determined necessary and reasonable.
- Prior to the payment of all supportive services, Turning Point ensures that participant case files maintain accurate records, and the Virtual One Stop (VOS) and Job Training Automation (JTA) systems are updated with the appropriate activity codes.
- Prior to enrollment, Turning Point obtains proof and documents income eligibility.
- Turning Point ensures follow-up contact is made upon exit to determine a client’s employment or educational status after exiting the WIA program.
- Turning Point ensures their worksite application agreements are updated and include the work experience start and end dates.

Because the methodology for the WIB staff monitoring review included sample testing, this report is not a comprehensive assessment of all the areas included as part of Turning Point’s contract, program and fiscal operations. It is Turning Point’s responsibility to ensure that their systems, program, and related activities comply with the WIA related regulations and applicable State directives. Therefore, any deficiencies identified in subsequent reviews, such as an audit, would remain Turning Point’s responsibility.

WIB staff sent a draft monitoring letter to Turning Point on April 25, 2014, addressing the observations noted above. The protocols and monitoring guidelines provide up to 15 working days after the receipt of the draft monitoring report for Turning Point to submit a response. No response was received to the draft report; therefore the report stands as final.

Please extend our appreciation to your staff for their cooperation and assistance during our review. If you have any questions regarding this report or the review that was conducted, please contact me at (831) 759-6644.

Sincerely,



**Joyce Aldrich**  
**Executive Director**

Monterey County Workforce Investment Board

cc:

Marleen Esquerra, WIB Management Analyst  
Rosie Chavez, Adult Program Director  
Pearl Sanchez, Youth Program Director

---

# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD EXECUTIVE COMMITTEE

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

**SUBJECT:** CONCUR WITH THE JULY 10, 2014 OVERSIGHT COMMITTEE ACTION TO APPROVE THE FINAL WORKFORCE INVESTMENT ACT (WIA) TITLE I ADULT PROGRAM MONITORING REPORT FOR PROGRAM YEAR 2013-14 FOR TURNING POINT OF CENTRAL CALIFORNIA

**DATE:** JULY 16, 2014

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**RECOMMENDATION:**

It is recommended that the Executive Committee concur with the July 10, 2014 Oversight Committee action to approve the FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report for Program Year 2013-14 for Turning Point of Central California.

**BACKGROUND:**

The Monterey County Board of Supervisors approved the WIA adult subcontract with Turning Point in the amount of \$160,949, for Program Year (PY) October 1, 2013 to June 30, 2014. The contract provides core, intensive, training and supportive services to forty-eight (48) WIA eligible adults who are 18 years of age and older 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. Twenty-eight (28) will participate in On-the-Job Training (OJT) or Individual Training Accounts (ITA) and nineteen (19) participants will receive direct placement services.

**DISCUSSION:**

This is to report the results of the WIB compliance monitoring review of the activities performed by Turning Point for Program Year 2013-14.

This is a sampling review that covered the period of October 1, 2013 to January 31, 2014.

Although there were no findings, program staff was advised of the following:

- As a follow-up to the Monterey County's response to the State of California Employment Development Department's Compliance Review Office on all open findings and local monitoring reviews of previous observations, Turning Point's program was reviewed and found to be in compliance.

WIB staff sent a draft monitoring letter to Turning Point on April 25, 2014. The protocols and monitoring guidelines provide up to 15 working days after the receipt of the draft monitoring report for Turning Point to submit a response. No response was received to the draft report; therefore the report stands as final.

**ATTACHMENT:**

FINAL WIA Title I Adult Program Monitoring Report for Program Year 2013-14 for Turning Point

# MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT

## Monterey County Workforce Investment Board

ERIK CUSHMAN, CHAIR

JOYCE ALDRICH, WIB EXECUTIVE DIRECTOR



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May 23, 2014

Deborah Carrillo, Executive Director  
Turning Point of Central California  
116 East San Luis Street  
Salinas, CA 93901

**RE:** FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report, Program Year 2013-14

This is to report the results of our subcontract compliance monitoring for the Workforce Investment Act (WIA) Adult Title I activities performed by Turning Point of Central California (Turning Point) for program year 2013-14. The fiscal review covered the period of October 1, 2013 – December 31, 2013 and the program review covered the period of October 1, 2013 - January 31, 2014. WIB staff Marleen Esquerra conducted the monitoring review.

The purpose of this review was to evaluate Turning Point's compliance with the provisions of WIA, associated regulations and directives, local policies, and the provisions of their contract with the Monterey County Workforce Investment Board. Information collected for this report was provided through a desk review of Turning Point's expenditures and enrollments; interviews with Turning Point staff, as well as the results of a participant case file review. WIB staff also performed a follow-up on all open findings identified by the State's Compliance Review Office.

**Monitoring Dates:** March 20-21, 2014 at 111 East San Luis Street, Salinas, CA.

**Background:** The Monterey County Board of Supervisors approved the WIA adult subcontract with Turning Point in the amount of \$160,949, for Program Year (PY) October 1, 2013 to June 30, 2014. The contract provides core, intensive, training and supportive services to forty-eight (48) WIA eligible adults who are 18 years of age and older 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. Twenty-eight (28) will participate in On-the-Job Training (OJT) or Individual Training Accounts (ITA) and nineteen (19) participants will receive direct placement services.

### I. **DESK REVIEW:**

Table 1: Turning Point's performance was reviewed for compliance with the contract plan for the quarter period ending December 31, 2013. Turning Point's total actual expenditures are \$6,183 (12%) of its planned budget. Training expenditures are \$0, staff salaries and benefits expenditures are \$3,808 (14%) and supportive service expenditures are \$186 (7%) of plan. The low expenditures are due to the delay in Turning Point's contract start date. This contract period for PY 2013-14 started one quarter later than the previous two contract years.

#### i. **Expenditures – Table 1:**

Program Year 2013-14	Training	Staff Salaries & Benefits	Supportive Services	Total Contract
Dec 2013 Plan	\$14,054	\$26,942	\$2,526	\$53,113
Dec 2013 Actual	\$0	\$3,808	\$186	\$6,183
% of Plan	0%	14%	7%	12%

Table 2: Turning Point’s total enrollments are 57% (13) of plan with 35% (7) enrollments placed into training and 16% (3) enrolled as direct placements and placed into unsubsidized employment. Turning Point’s geographic enrollments are higher than planned for the South and West County areas, while the Central and North County areas are below goal. A total of 31% were placed within the WIB approved industry clusters. All training enrollments (100%) successfully completed the WorkKeys® assessments in Applied Math, Locating Information and Reading for Information.

As of the 3<sup>rd</sup> Quarter period, Turning Point exceeded the 80% minimum target levels, for the number of enrollments achieved to date, for all the Common Measures performance goals with local success levels at 142% for entered employment, 99% for retention, and 88% for average earnings.

Table 3: Turning Point exceeded the minimum WIB established target population goals for all target groups except for veterans.

**ii. Enrollments – Table 2:**

Program Year 2013-14	New Enrollments	Training (ITA/OJT)	Geographic Areas Served Min Goal = 10%				Industry Clusters (OJT/ITA/DP)
			Central	North	South	West	
Jan 2014 Plan	23	20	65%	10%	5%	20%	50%
Jan 2014 Actual	13	7	7		1	5	4
% of Plan	57%	35%	54%	0%	8%	38%	31%

*Direct placements 3 of 19; 16%*

**iii. Enrollments – Table 3:**

Program Year 2013-14	Target Populations Served				
	Veterans & Eligible Spouses	HS Dropout	Disabled	Ex Offender	Homeless
Jan 2014 Plan	5%	15%	15%	50%	15%
Jan 2014 Actual	0	4	7	13	7
% of Plan	0%	31%	54%	100%	54%

**II. FIELD REVIEW:**

Seven adult participant case files were randomly selected and reviewed. The adult case files were reviewed to ensure compliance with the contract requirements and WIA regulations. The file monitoring conducted by WIB staff included a review of eligibility, assessment, work experience compliance, supportive services, timesheets, and performance evaluations. The files were well organized with checklists and included all the necessary eligibility and right-to-work documentation.

**i. Staff Interviews**

WIB staff met with and interviewed Turning Point staff Ms. Rosie Chavez. Staff is very knowledgeable with the provisions of WIA, associated regulations and directives, local policies, and the provisions of their contract.

**ii. Financial Accounting Internal Controls**

A sample of the fiscal data in the participant case files were reviewed to ensure compliance with OJT and ITA contract requirements and WIA regulations. The monitoring included the review of adequate documentation of supportive services, timesheets and timely posting and adherence to established fiscal procedures and WIB policies.



### III. **CONCLUSION:**

The results of the performance review, and interviews with Turning Point staff indicate that Turning Point is satisfactorily meeting their PY 2013-14 adult subcontract provisions. An exit interview was conducted on Friday, March 21, 2014 with Turning Point Staff Ms. Rosie Chavez, Ms. Deborah Carrillo and Ms. Pearl Sanchez. Although there were no findings, program staff was advised of the following observations:

#### **Follow-up – State and Local Monitoring:**

As a follow-up to the Monterey County's response to the State of California Employment Development Department's Compliance Review Office on all opening findings and local monitoring reviews of previous observations, Turning Point's program was reviewed and found to be in compliance with the following:

- Developed and implemented a supportive services tracking log to ensure adequate safeguards are in place, prior to the payment of all supportive services – to include justification on the Individual Employment Plan (IEP) on how supportive services are determined necessary and reasonable
- Prior to the payment of all supportive services, Turning Point ensures that participant case files maintain accurate records, and the Virtual One Stop (VOS) and Job Training Automation (JTA) systems are updated with the appropriate activity codes.
- Prior to enrollment, Turning Point obtains proof and documents income eligibility.
- Turning Point ensures follow-up contact is made upon exit to determine a client's employment or educational status after exiting the WIA program.
- Turning Point's geographic enrollments are higher than planned for the South and West County areas, while the Central and North County areas are below goal.

Because the methodology for the WIB staff monitoring review included sample testing, this report is not a comprehensive assessment of all the areas included as part of Turning Point's contract, program and fiscal operations. It is Turning Point's responsibility to ensure that their systems, program, and related activities comply with the WIA related regulations and applicable State directives. Therefore, any deficiencies identified in subsequent reviews, such as an audit, would remain Turning Point's responsibility.

WIB staff sent a draft monitoring letter to Turning Point on April 25, 2014, addressing the observations noted above. The protocols and monitoring guidelines provide up to 15 working days after the receipt of the draft monitoring report for Turning Point to submit a response. No response was received to the draft report; therefore the report stands as final.

Please extend our appreciation to your staff for their cooperation and assistance during our review. If you have any questions regarding this report or the review that was conducted, please contact me at (831) 759-6644.

Sincerely,



**Joyce Aldrich**  
**Executive Director**

Monterey County Workforce Investment Board

cc:

Marleen Esquerra, WIB Management Analyst  
Rosie Chavez, Adult Program Director  
Pearl Sanchez, Youth Program Director

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD EXECUTIVE COMMITTEE

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

**SUBJECT:** CONCUR WITH THE JULY 10, 2014 OVERSIGHT COMMITTEE ACTION TO APPROVE THE FINAL WORKFORCE INVESTMENT ACT (WIA) TITLE I ADULT PROGRAM MONITORING REPORT FOR PROGRAM YEAR 2013-14 FOR SHORELINE WORKFORCE DEVELOPMENT SERVICES

**DATE:** JULY 16, 2014

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**RECOMMENDATION:**

It is recommended that the Executive Committee concur with the July 10, 2014 Oversight Committee action to approve the FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report for Program Year 2013-14 for Shoreline Workforce Development Services.

**BACKGROUND:**

The Monterey County Board of Supervisors approved the WIA adult subcontract with Shoreline in the amount of \$174,361, for Program Year (PY) October 1, 2013 to June 30, 2014. The contract provides core, intensive, training and supportive services to fifty-two (52) WIA eligible adults who are 18 years of age and older 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. Twenty-seven (27) will participate in On-the-Job Training (OJT) or Individual Training Accounts (ITA) and twenty-four (24) participants will receive direct placement services.

**DISCUSSION:**

This is to report the results of the WIB compliance monitoring review of the activities performed by Shoreline for Program Year 2013-14.

This is a sampling review that covered the period of October 1, 2013 to January 31, 2014.

Although there were no findings, program staff was advised of the following:

- As a follow-up to the Monterey County's response to the State of California Employment Development Department's Compliance Review Office on all open findings and local monitoring reviews of previous observations, Shoreline's program was reviewed and found to be in compliance.

WIB staff sent a draft monitoring letter to Shoreline on April 25, 2014. The protocols and monitoring guidelines provide up to 15 working days after the receipt of the draft monitoring report for Shoreline to submit a response. No response was received to the draft report; therefore the report stands as final.

**ATTACHMENT:**

FINAL WIA Title I Adult Program Monitoring Report for Program Year 2013-14 for Shoreline

# MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT

## Monterey County Workforce Investment Board

ERIK CUSHMAN, CHAIR

JOYCE ALDRICH, WIB EXECUTIVE DIRECTOR



May 23, 2014

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Mr. John Collins, Senior VP of Workforce Development Services  
Goodwill Industries of Santa Cruz/Monterey/San Luis Obispo DBA  
Shoreline Workforce Development Services  
350 Encinal Street  
Santa Cruz, CA 95060

**RE:** FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report, Program Year 2013-14

This is to report the results of our subcontract compliance monitoring for the Workforce Investment Act (WIA) Adult Title I activities performed by Shoreline Workforce Development Services (Shoreline) for program year 2013-14. The fiscal review covered the period of October 1, 2013 – December 31, 2013 and the program review covered the period of October 1, 2013 - January 31, 2014. WIB staff Marleen Esquerra conducted the monitoring review.

The purpose of this review was to evaluate Shoreline's compliance with the provisions of WIA, associated regulations and directives, local policies, and the provisions of your contract with the Monterey County Workforce Investment Board. Information collected for this report was provided through a desk review of Shoreline's expenditures and enrollments; interviews with Shoreline staff, participants, as well as the results of a participant case file review. WIB staff also performed a follow-up on all open findings identified by the State's Compliance Review Office.

**Monitoring Date:** March 19, 2014 at 1325 North Main Street, Salinas, CA.

**Background:** The Monterey County Board of Supervisors approved the WIA adult subcontract with Shoreline in the amount of \$174,361, for Program Year (PY) October 1, 2013 to June 30, 2014. The contract provides core, intensive, training and supportive services to fifty-two (52) WIA eligible adults who are 18 years of age and older 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. Twenty-seven (27) will participate in On-the-Job Training (OJT) or Individual Training Accounts (ITA) and twenty-four (24) participants will receive direct placement services.

### I. **DESK REVIEW:**

Table 1: Shoreline's performance was reviewed for compliance with the contract plan for the quarter period ending December 31, 2013. Shoreline's total actual expenditures are \$41,387 (72%) of plan with training expenditures at \$2,690 (18%) of plan. Staff salaries and benefits expenditures are \$40,235 (99%) of plan and supportive service expenditures are \$1,152 (63%) of plan. The low expenditures are due to the delay in Shoreline's contract start date. This contract period for PY 2013-14 started one quarter later than the previous two contract years.

#### i. **Expenditures – Table 1:**

Program Year 2013-14	Training	Staff Salaries & Benefits	Supportive Services	Total Contract
Dec 2013 Plan	\$15,147	\$40,559	\$1,832	\$57,539
Dec 2013 Actual	\$2,690	\$40,235	\$1,152	\$41,387
% of Plan	18%	99%	63%	72%

Table 2: Shoreline’s total enrollments are 46% (12) of plan with 90% (9) enrollments placed into training and 1 enrolled as a direct placement and placed into unsubsidized employment. Shoreline’s geographic enrollments are 75% for the Central area, 17% for South County, 8% for West County and at 0% for North County. A total of 33% were placed within the WIB approved industry clusters. All training enrollments have been assessed using the WorkKeys® Readiness Indicator tool to determine an individual’s readiness for WorkKeys® testing.

As of the 3<sup>rd</sup> Quarter period, Shoreline exceeded the 80% minimum target levels, for the number of enrollments achieved to date, for all the Common Measures performance goals with local success levels at 111% for entered employment, 92% for retention, and 96% for average earnings.

Table 3: Service to the high school drop outs, ex offenders, and homeless are well above plan, while the veterans/eligible spouses and disabled populations are below the contract plan goals.

**ii. Enrollments – Table 2:**

Program Year 2013-14	New Enrollments	Training (ITA/OJT)	Geographic Areas Served Min Goal = 10%				Industry Clusters (OJT/ITA/DP)
			Central	North	South	West	
Jan 2014 Plan	26	10	35%	25%	20%	20%	50%
Jan 2014 Actual	12	9	9		2	1	4
% of Plan	46%	90%	75%	0%	17%	8%	33%

*Direct placements 1 of 24; 4%*

**iii. Enrollments – Table 3:**

Program Year 2013-14	Target Populations Served				
	Veterans & Eligible Spouses 10%	HS Dropouts 20%	Disabled 16%	Offenders 10%	Homeless 5%
Jan 2014 Plan	19%	39%	19%	13%	19%
Jan 2014 Actual	1	6	1	3	9
% of Plan	8%	50%	8%	25%	75%

**II. FIELD REVIEW:**

Six adult participant case files were randomly selected and reviewed. The adult case files were reviewed to ensure compliance with the contract requirements and WIA regulations. The file monitoring conducted by WIB staff included a review of eligibility, assessment, work experience compliance, supportive services, timesheets, and performance evaluations. The files were organized with checklists and included all the necessary eligibility and right-to-work documentation.

**i. Participant, Employer and Staff Interviews**

WIB staff met with Shoreline staff and interviewed an adult participant and employer on April 10, 2014. The participant and employer were very pleased with Shoreline. The employer specifically stated that the services are effective and that staff have done a great job of communicating with employers to inform them of the services and opportunities available to the business community.

**ii. Financial Accounting Internal Controls**

A sample of the fiscal data in the participant case files were reviewed to ensure compliance with OJT and ITA contract requirements and WIA regulations. The monitoring included the review of adequate documentation of supportive services, timesheets and timely posting and adherence to established fiscal procedures and WIB policies.

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD EXECUTIVE COMMITTEE

**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

**SUBJECT:** CONSIDER APPROVAL OF SUBMISSION OF THE WORKFORCE INNOVATION FUND (WIF) GRANT TO THE DEPARTMENT OF LABOR EMPLOYMENT AND TRAINING ADMINISTRATION (DOL ETA) TO SERVE MOST AT-RISK YOUTH AGES 16-21. SUBMIT TO FULL BOARD AT THEIR AUGUST 6, 2014 MEETING FOR FURTHER APPROVALS. SHOULD THE GRANT BE AWARDED, THE PROPOSAL WILL BE PLACED ON THE BOARD OF SUPERVISORS AGENDA FOR FINAL APPROVAL TO ACCEPT THE AWARD

**DATE:** JULY 16, 2014

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**RECOMMENDATION:**

It is recommended that the Executive Consider approval of submission of the Workforce Innovation Fund (WIF) Grant to the Department of Labor Employment and Training Administration (DOL ETA) to serve most at-risk youth ages 16-24. Submit to full board at their August 6, 2014 meeting for further approvals. Should the grant be awarded, the proposal will be placed on the Board of Supervisors agenda for final approval to accept the award.

**INFORMATION:**

The Employment and Training Administration (ETA), U.S. Department of Labor (DOL), announced the availability of up to \$53 million in grant funds to be awarded under the Workforce Innovation Fund (WIF) grant program and anticipates awarding between 8 - 15 grants. These funds support innovative approaches that generate long-term improvements in the performance of the public workforce system, outcomes for job seekers and employers, and cost-effectiveness. All projects funded under the WIF will be rigorously evaluated in order to build a body of knowledge about what works in workforce development.

The purpose of the WIF is to support a job-driven approach to workforce development by funding innovative approaches to the design and delivery of employment and training services that generate long-term improvements in the performance of the public workforce system, outcomes for job seekers and employers, and cost-effectiveness.

Grants funded under the WIF will achieve the following within the workforce system: 1) better results for jobseekers and employers – such as reduced duration of unemployment, increased educational gains that lead to work readiness, academic and industry-recognized credential attainment, increased earnings, increased competitiveness of employers, etc.; 2) greater efficiency in the delivery of quality services - such as more customers (job seekers or employers) served, decreased program attrition, increased customer throughput, faster entry into employment, achieving outcomes at a lower cost, or reduction in duplicative program components and related administrative costs; and 3) stronger cooperation across programs and funding streams – such as integrated data management information systems, braided funding<sup>1</sup>, or changes that create a more seamless service delivery experience for participants who need help from multiple programs.

### III. **CONCLUSION:**

The results of the performance review, and interviews with Shoreline staff indicate that Shoreline is satisfactorily meeting their PY 2013-14 adult subcontract provisions. An exit interview was conducted on March 19, 2014 with Mr. Wil Moore, Ms. Lorena Garcia, and Ms. Vanessa Estrada. Although there were no findings, program staff was advised of the following observations:

#### **Follow-up – State and Local Monitoring:**

As a follow-up to the Monterey County's response to the State of California Employment Development Department's Compliance Review Office on all opening findings and local monitoring reviews of previous observations, Shoreline's program was reviewed and found to be in compliance with the following:

- Developed and implemented a supportive services tracking log to ensure adequate safeguards are in place, prior to the payment of all supportive services.
- Prior to the payment of all supportive services, Shoreline ensures that participant case files maintain accurate records, and the Virtual One Stop (VOS) and Job Training Automation (JTA) systems are updated with the appropriate activity codes.
- Prior to enrollment, Shoreline obtains proof and documents income eligibility.
- Shoreline ensures follow-up contact is made upon exit to determine a client's employment or educational status after exiting the WIA program.
- Shoreline has restructured its fiscal operations to ensure claims are submitted in a timely fashion.
- As of the February 2014 billing period, monthly claims and reimbursements have begun to report accruals.

Because the methodology for the WIB staff monitoring review included sample testing, this report is not a comprehensive assessment of all the areas included as part of Shoreline's contract, program and fiscal operations. It is Shoreline's responsibility to ensure that their systems, program, and related activities comply with the WIA related regulations and applicable State directives. Therefore, any deficiencies identified in subsequent reviews, such as an audit, would remain Shoreline's responsibility.

WIB staff sent a draft monitoring letter to Shoreline on April 25, 2014, addressing the observations noted above. The protocols and monitoring guidelines provide up to 15 working days after the receipt of the draft monitoring report for Shoreline to submit a response. No response was received to the draft report; therefore the report stands as final.

Please extend our appreciation to your staff for their cooperation and assistance during our review. If you have any questions regarding this report or the review that was conducted, please contact me at (831) 759-6644.

Sincerely,



Joyce Aldrich  
Executive Director  
Monterey County Workforce Investment Board

cc:

Marleen Esquerra, WIB Management Analyst  
Wil Moore, Director of Workforce Services-Monterey/Santa Cruz Counties  
Sara Jamison, Assistant Director of Workforce Services-Monterey/Santa Cruz Counties

Monterey County WIB in collaboration and its partners intend to match targeted youth with an innovative approach of integrated service delivery and community engagement to address the dual outcomes of gang violence prevention and training and employment. The vision is to break the cycle of intergenerational violence that plagues Monterey County.

The project contains two levels of innovation: First, it attempts to weave together previously tested and untested service elements into a comprehensive mix of services. Second, it attempts to measure the synergistic effect of deep collaboration, data-collection, and enhancing the services and resources that the County of Monterey and its partners already provide, learning how to increase impact per every dollar spent. The following key strategies and inputs will support individual- and system-level outcomes:

- *Deep collaboration between cross-sector community partners in the design, oversight and ongoing improvement of programs*, which will result in an engaged, consistent team of subject matter experts involved through all stages of the program development, implementation and evaluation, promoting open innovation.
- *Comprehensive and coordinated case management*, where participants are cared for by a multi-disciplinary team, creating a seamless delivery of their employment, social, educational, health, behavioral health, and/or probation service needs.
- *Integration of data collection, management and analysis across service partners* countywide, providing the ability to input and extract relevant, comparable data across service providers, and having proper data-agreements in place.
- *Data-driven decision-making*, including targeted recruitment of participants based on need, and real-time program responsiveness to performance measures.
- *Two-way community engagement and positive relationship building* to enhance education and employability skills, through cross-age mentorship opportunities and community-based action research.
- *Extended, intensive service provision based on individual needs*, providing rigorous assessments at enrollment and interim periods of the program; individualized, comprehensive learning and service plans for every client; extended service periods that include performance benchmarks before moving to the next level of the program; and post-program services.
- *Linkage of occupational exploration and skills development to local, high-demand and employer needs*, including a feedback loop between employers and educators/service providers through all phases of the program, from planning to final evaluation.

Through these and other programmatic strategies, the Youth Ambassadors for Peace program will offer a comprehensive workforce development experience for youth. By engaging youth in evidence-based program strategies that include skill-building, relationships, and meaningful experiences, youth will develop resilience and they will learn to positively contribute to their community. Over the grant period, approximately 240 youth will participate in regionally based cohorts. The length of the grant is 60 months, with the first 12 months for development; years 2-4 in implementation, and year 5 in follow-up and intensive evaluation of the project.

# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD EXECUTIVE COMMITTEE  
**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD  
**SUBJECT:** UPDATE ON THE LOCAL WIA BUDGET FOR PY 2013-14  
**DATE:** JULY 16, 2014

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**INFORMATION:**

WIB staff plan to present an update on the Local WIA budget for 2013-14.

**ATTACHMENT:**

Reference budget handout at meeting.



# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD EXECUTIVE COMMITTEE  
**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD  
**SUBJECT:** UPDATE ON THE WIB'S STRATEGIC LOCAL PLAN  
**DATE:** JULY 16, 2014

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**SUMMARY:**

At the Executive Committee meeting on July 16, 2014, WIB staff plan to present an update on the WIB's Key Strategic Local Plan.

**ATTACHMENT:**

Strategic Local Plan

**Monterey County Workforce Investment Board  
Key Strategic Goals, Strategies and Actions – PY 2013-17**

**GOAL #1 – BUSINESS AND INDUSTRY:** Meet workforce needs of high demand sectors.

**Strategy 1 – Actions: Develop LMI to identify workforce needs, shortages & skills gaps.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
May 2013	ADE, EMSI, EconoVue, WIB Staff, Stakeholders	1. Develop LMI on priority industry sectors and needs to include interviews w/stakeholders.	May 2013 Ongoing	Yes		LMI posted to WIB website. Data used in Local Plan.
June 2013	WIB Staff & MPC Chamber	2. Work with local chambers to survey members on workforce development needs.		Date revised to Sep	Sep 2013	Prelim data presented at Youth Council meeting 9/10/2013.
July 2013	Business Services Team	3. Use EZ survey “synchronist” for info on business growth, development and overall trends.	July 2013	Yes		Report to Bus Services Committee 8/27/2013.  Ongoing South County business retention expansion surveys conducted. Results reported to Business Services Committee on 4/8/2014.
Aug 2013	Business Services Team	4. Develop survey to assess workforce needs of employers participating in OJT.	Aug 2013	Yes		Report to Bus Services Committee 8/27/2013.
Sep/Oct 2013	SBDC & Business Services Committee	5. Work with SBDC and National Info Clearinghouse to identify resources to small businesses.		No	Dec 2013	Presentation to Bus Services Committee 12/10/2013.
Sep/Oct 2013	SBDC & Business Services Committee	6. Attend SBDC roundtables of industries that have high growth, ask how to close gaps.		No	Dec 2013	Presentation to Bus Services Committee 12/10/2013.
Sep/Oct 2013	WIB Staff & Business Services Team	7. Use WIN® to prepare individuals for WorkKeys® assessments at AJCC.	In progress			WIB members and CSUMB students evaluating program.
Sep/Oct 2013	WIB Staff & Business Services Team	8. Use WorkKeys® assessments to identify skill gaps and certify worker proficiencies at AJCC.	In progress			WIB members and CSUMB students evaluating program.

**Strategy 2 – Actions: Develop Business Services Plan.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
June 2013	WIB Staff & Business Services Committee	1. Develop Business Services Plan with Business Services Committee input.	June 2013	Yes		Plan submitted to State and posted on WIB website.
Aug 2013	WIB & Business Services Team	2. Business Services and RR Team to enhance business retention and layoff aversion strategies.	Aug 2013 Ongoing	Yes		Team convened 8/6. Report to Bus Services Committee 8/27/2013.  Rapid Response draft directive is being developed by the State. Stay tuned for new guidance on layoff aversion strategies embedded in draft directive.
Aug 2013	Business Services Team	3. Work with Business Services to conduct customized job fairs and recruitments.	Aug 2013 Ongoing	Yes		Report to Bus Services Committee 8/27/2013. Ongoing job fairs to be reported

regularly.

Community Job Fair, March 31, 2014, 709 job seekers and 100 employers attended. Endorsed by Assembly member Luis Alejo, supported by partners to include OET/WIB staff.

**Strategy 3 – Actions: Develop and operate regional workforce and economic development network.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
Aug 2013	WIB & Economic Development Staff	1. Align WIB with Econ Dev Committee to understand opportunities for job seekers, business & education.	Aug 2013 In progress	Yes	October 2013	Director of Econ Dev is attending WIB meetings. Director of WIB attending Economic Dev Committee meetings.
Sep 2013	WIB Members	2. Evaluate LMI tools for use to identify industry sectors and partnerships and WIB's role is in each sector.	Sep 2013	Yes		WIB initiated subscription with EMSI.
Sep/Oct 2013	WIB & Business Services Team	3. Convene roundtables (industry, educators & policy makers) to identify training needs & career pathways.	In progress	Ongoing	November 2013	Convened HART meeting November 6, 2013 in partnership with Hartnell College.

**GOAL #2 – SYSTEM ALIGNMENT AND ACCOUNTABILITY:** Support system alignment, service integration and continuous improvement using data to support evidence-based policymaking.

**Strategy 1 – Actions: Ensure active engagement of WIB and workforce stakeholders.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
June 2013	WIB Staff & Members	1. Recruit members to serve on WIB (Ag, Tourism/Hospitality, Healthcare, and Education).		Yes	Oct 2013	Report to Executive Committee 8/21 and 9/18. BD membership has added business members from Hospitality/Tourism, and Banking.
July 2013	WIB Staff	2. Convene WIA provider meetings to share info on programs, roles, benefits/value, and challenges.		Yes	Oct 2013	Convene when new contracts are approved for PY 2013-14. 2/19/14 & 2/24/14, additional Collaborative meetings on Pathways Trust Fund with regional partners including education (HS; Adult Ed; CC's; CSUMB, businesses from healthcare.
Aug 2013	WIB Staff & AJCC partners	3. Institute national branding of "America's Job Center", formerly known as One-Stop Career Center.	Aug 2013	Yes	5/14	Ongoing, incorporating brand as updates occur. New signage will occur as funding permits. This is on hold due to possible relocation of America's Job Center in next fiscal year.

**Strategy 2 – Actions: Ensure services delivered are accessible and meet diverse groups.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
Sep/Oct 2013	WIB Staff & AJCC partners	1. Work with America's Job Center (One-Stop) partners to ensure continuation of integrated services.	In progress	Yes	7/14	In progress of updating MOUs to re-evaluate offerings. WIOA will provide new language for integrated services of Job Center partners (to follow)
Sep/Oct 2013	WIB Staff & AJCC partners	2. Ensure services are available to diverse groups (disabled, vets, older workers, migrant workers, etc.)	In progress	Yes		In progress of updating MOUs to re-evaluate offerings. Behavioral Health has joined DSS at the Employment Center adding additional services to diverse groups of participants

**Strategy 3 – Actions: Demonstrate value and impact of workforce system.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
July 2013	WIB Staff & AJCC partners	1. Report on services and outcomes to Oversight Committee. (Ensure jobs align w/industry sectors)	July 2013 Ongoing	Yes		In progress; ongoing.
Aug 2013	WIB Staff & AJCC partners	2. Promote accomplishments, program benefits/value, outcomes and client testimonials.	Aug 2013 Ongoing	Yes		Testimonials scheduled at all WIB and YC meetings.
Sep 2013	WIB Staff & Members	3. Inform staff on mission and vision of WIB and Local Plan strategic initiatives.	Sep 2013	Yes		BOS approved Local Plan on 8/27. Submitted signed Local Plan to State on 9/30, posted signed copy on WIB website, and emailed to all staff. Presented budget and local plan strategic initiatives to all staff on 9/30. Staff signed forms acknowledging their review and understanding of the Local Plan. 2/13/14-Received letter from State of High Performing WIB status!
Comments / Suggestions:						

**GOAL #3 – ADULTS:** Increase number of people who obtain industry-recognized credentials or degree, with emphasis on unemployed, underemployed, low skilled, low-income, vets, disabled & other at-risk populations.

**Strategy 1 – Actions: Increase the number of career pathway programs in demand industries.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
PY 2012-13	WIB Staff & AJCC partners	1. Increase availability of training to WIA enrollments.	Since PY 2012-13 On-going	Yes		Started in PY 2012-13. Monitored through Oversight.
Oct 2013	WIB Staff & AJCC partners, Business Council	2. Work with education and WIA providers to promote and implement Career Readiness Certification.	In progress	Yes		WIB members and CSUMB students evaluating program.

Dec 2013	WIB Staff	3. Inventory and update training in ETPL and align programs to occupations in target industry sectors.	In progress	Ongoing	November 2013	Reference new ETPL guidance released November 13, 2013. Plans to facilitate training of ETPL providers of new requirements, 2/24/2014. ETPL is undergoing significant changes with new guidance from State. More detailed information to be presented at future meetings.
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**Strategy 2 – Consider strategies that would avert lay-offs, help retain workers jobs or provide rapid transition to new employment.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
Aug 2013	WIB Staff & AJCC partners, SBDC, Stakeholders	1. Secure ETP funding opportunities to provide incumbent worker training.	Started in Mar 2013	Yes	November 2013	CWA received additional ETPL funding allotment therefore as businesses are identified, please refer them to Joyce to assist in paperwork to send up to CWA for review/approval
Aug 2013	Business Services & Rapid Response Team	2. Ensure BSR and RR Teams promote services and resources that benefit employers (tax credits, incentives, OJT subsidies, ETP funding, TAA, Work Share, WorkKeys and WIN.	Aug 2013 Ongoing	Yes	May 2014	Updates presented at Business Services Committee regularly. Since July 2013 a total of 466 employers served; 665 applicants were pre-screened prior to referral to local employers for placement; 131 job openings posted online in VOS; 744 participants referred to area employers hiring; 66 job fairs and custom recruiting events hosted by BSR Team.
Sep 2013	WIB Staff & AJCC partners	3. Effectively use UI claimant data, mass layoff and WARN data to strategize layoff aversion efforts.	Sep 2013 Ongoing	Yes	May 2014	Updates presented at Business Services Committee regularly. River Ranch Fresh Foods Job Fair held in October for those facing layoff. Community Job Fair held at Monterey Convention Center on March 31, 2014. More than 100 employers and 700 job seekers. This very successful Collaborative included Monterey, Santa Cruz and San Benito agencies.

**Strategy 3 – Actions: Increase the number of career pathway programs available in our area that are directly connected to our demand industries. Use models like apprenticeship, on-the-job training, “Earn and Learn” or customized training most effectively.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
Sep/Oct 2013	WIB Staff & Members, AJCC Partners	1. Ensure local WIB policies align with demand priority industry sectors.		In progress	November 2013	Facilitate discussions at OS & Youth Council and Executive Committee meetings Nov 2013.

Oct 2013	AJCC Partners, Business Services & RR Team	2. Streamline processes for employers to participate in on-the-job training.	Ongoing	Ongoing work with primary operator employment center eligibility process to streamline process more effectively. Process can take up to 8 days but work is being done to streamline to shorter duration on reverse referrals.
Oct 2013	AJCC Partners	3. Ensure training funds target apprentice occupations, including pre-apprenticeships, coordinated with Dept of Industrial Relations/Div of Apprenticeship Standards (DIR-DAS) approved apprenticeship programs.	In process	Prop 39 Development Grant is working directly to target construction/plumbing/electrical pre-apprenticeship programs through MC3 training curriculum
Comments / Suggestions:				

**Goal #4 – YOUTH:** Increase number of HS students, with emphasis on at-risk and low-income youth, who graduate prepared for postsecondary vocational training, further education, and/or a career.

**Strategy 1 – Actions: Facilitate collaborations necessary to better serve youth and successfully connect them to education and training opportunities that lead to successful employment.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
Aug/Sep 2013	WIB Staff, WIB and YC Chairs	1. Include a Youth related item on every WIB meeting agenda that focuses on helping youth.	Aug 2013 Ongoing	Yes		In progress and ongoing.
Sep 2013	WIB Staff, Youth Council	2. Partner with educators to promote job leads, workshops, tutoring, and other youth related resources. (i.e. Choices)	Initiated in Sep 2013 Ongoing	Yes		Sep 2013 Youth Council meeting featured CHOICES presentation. March 2014 Girls Inc. presentation
Sep 2013	Youth Council	3. Strengthen linkages with education through a speakers' bureau "classroom to careers" effort.	In progress			Shared survey results with YC members to discuss next steps. April 28, 2014 Everett Alvarez High School Presentation to Seniors by WIB staff rescheduled to September 2014
Sep 2013	Youth Council	4. Ask Youth Council members to bring in job leads and market programs with business.	In progress	Yes/ongoing		Shared survey results with YC members to discuss next steps.

Comments / Suggestions:

**Strategy 2 – Actions: Increase educational, training and career attainment of youth.**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
Jan 2014	Youth Council and workforce stakeholders	1. Identify, promote and increase the use of enrollment in Career Technical Education programs, career-based academies, Job Corps, and industry-themed HS as a		Ongoing as part of RFP for 2014		RFP in process, close date was April 29, 2014. Bidder's Conference held April 14, 2014

viable pathway to career readiness.					
Jan 2014	Youth Council and workforce stakeholders	2.	Align, promote, and increase the use of career exploration resources to ensure successful transition into postsecondary ed. (e.g. CA Career Zone, CA Career Center, Community College Career Café, etc.)	Ongoing as part of RFP for 2014	<b>Targeted in RFP process. Incorporated into Youth contract with Turning Point.</b>
Comments / Suggestions:					

# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD EXECUTIVE COMMITTEE  
**FROM:** JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD  
**SUBJECT:** DIRECTOR'S UPDATE  
**DATE:** JULY 16, 2014

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**INFORMATION:**

At the Executive Committee meeting, WIB Executive Director, Joyce Aldrich plans to present a verbal update on the following:

- Bill H.R. 803
- CWA Executive Committee
- Work Readiness Communities Academy
- CWA Retreat





# MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT

ERIK CUSHMAN, WIB CHAIR WORKFORCE INVESTMENT BOARD

## MONTEREY COUNTY WORKFORCE INVESTMENT BOARD (WIB)

Marina Library, 191 Seaside Circle, Marina, CA

**WEDNESDAY, AUGUST 6, 2014; 7:30 A.M.**

### AGENDA

**Erik Cushman,**  
*WIB & Executive Chair*

**Anthony Aniello**  
*WIB 1<sup>st</sup> Vice Chair*

**Mary Ann Leffel**  
*WIB 2<sup>nd</sup> Vice Chair*

**WIB Members:**

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

**Monterey County Workforce  
Investment Board (WIB)**

**Joyce Aldrich,**  
*WIB Executive Director*

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Salinas, CA 93905  
(831) 796-3324  
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<b>CALL TO ORDER/INTRODUCTIONS:</b>	
<b>CHANGES TO AGENDA:</b>	ERIK CUSHMAN
<b>PUBLIC COMMENT:</b>	
<b>CONSENT CALENDAR:</b>	ERIK CUSHMAN
1. <b>ACTION:</b> Approve minutes from April 2, 2014.	
2. <b>ACTION:</b> Concur with the July 16, 2014 Executive Committee action to approve the FINAL Workforce Investment Act (WIA) Title I Youth Program Monitoring Report for Program Year 2013-14 for the Santa Cruz County Office of Education.	
3. <b>ACTION:</b> Concur with the July 16, 2014 Executive Committee action to approve the FINAL Workforce Investment Act (WIA) Title I Youth Program Monitoring Report for Program Year 2013-14 for Turning Point of Central California.	
4. <b>ACTION:</b> Concur with the July 16, 2014 Executive Committee action to approve the FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report for Program Year 2013-14 for Turning Point of Central California	
5. <b>ACTION:</b> Concur with the July 16, 2014 Executive Committee action to approve the FINAL Workforce Investment Act (WIA) Title I Adult Program Monitoring Report for Program Year 2013-14 for Shoreline Workforce Development Services	
6. <b>ACTION:</b> Grant submittal	
<b>DISCUSSION/REVIEW OF BUSINESS CALENDAR ACTION ITEMS:</b>	ERIK CUSHMAN
1. Presentation on CVS Pharmacy.	KATHLEEN BURRIS
2. Review and approve FY 2014-15 WIB Budget	JOYCE ALDRICH/RUBEN TRUJILLO
3. Final review/approval and update on progress of WIB Strategic Initiatives for FY 2014-15	JOYCE ALDRICH
4. Briefing on Workforce Innovation Opportunity Act	JOYCE ALDRICH
<b>ANNOUNCEMENT OF EVENTS:</b>	
<b>SUBCOMMITTEE MEETINGS:</b>	
<b>BUSINESS:</b> 08/12/2014; Marina Library	
<b>EXECUTIVE:</b> 08/20/2014; Shoreline, Marina	
<b>YOUTH:</b> 09/09/2014; Shoreline, Marina	
<b>OVERSIGHT:</b> 09/11/2014; Shoreline, Marina	
<b>WIB MEETING:</b> 10/01/2014; Marina Library	
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> .	