



# PUBLIC MEETING NOTICE

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

Seaside One Stop Career Center  
1760 Fremont Blvd. Building D-2, Seaside, CA 93955

Thursday, January 14, 2010

8:30 a.m.

David Bernahl, II,  
WIB & Executive Chair

Erik Cushman,  
WIB Vice Chair

Joanne Webster,  
WIB 2<sup>nd</sup> Vice Chair

Robert Brower, Sr.,  
Past WIB Chair

### Oversight Committee Members:

Mary Ann Leffel,  
Chair

Al Davis  
Cesar Lara  
Jim Nakashima  
Michael Oprish  
Judith Profeta  
Teresa Sullivan

Monterey County  
Workforce Investment  
Board (WIB)

Joseph Werner,  
Executive Director

730 La Guardia Street  
Salinas, CA 93905  
(831) 759-6644  
Fax (831) 796-3512  
wernerj@co.monterey.ca.us  
www.montereycountywib.org

### AGENDA

**CALL TO ORDER/INTRODUCTIONS** Mary Ann Leffel, *Chair*  
**CHANGES TO THE AGENDA**  
**PUBLIC COMMENT** – For items not listed on the agenda. Limited to 3 min.

### BUSINESS MEETING

**1. Action:** Approve the minutes of the November 12, 2009 Oversight Committee meeting. (*See attached*) Mary Ann Leffel

**2. Action:** Approve the notes of the December 10, 2009 Oversight Committee meeting. (*See attached*) Mary Ann Leffel

**3. Action:** Approve the Final OET Monitoring Report for Disability Program Navigator (DPN) program for PY 2008-09 (*See attached*) Manley Bush

**4. Action:** Approve the Final OET Monitoring Report for the Veterans Apprenticeship program for PY2008-09 (*See attached*) Manley Bush

**5. Information:** Review of the Local Workforce Investment Area budget and One-Stop Operational costs for PY2008-09 and 2009-10. (*See attached*) Lynda Dunn

**6. Information:** Presentation of MIS and Fiscal reports for WIA Title I Adult Subcontractors for PY 2009-10. (*See attached*) Manley Bush

**7. Information:** Discussion and update regarding the Eligible Training Provider List (ETPL) for PY 2009-10. (*See attached*) Miguel Banda

**8. Information:** Discussion and update regarding the Workforce Investment Board (WIB) Member attendance for PY 2009-10. (*See attached*) Loyanne Flinn

**9. Information:** Discussion regarding the services and activities of Shoreline's Adult Program for PY 2009-10. (*See attached*) Wil Moore

**10. Information:** Discussion regarding the services and activities of Arbor's Adult Program for PY 2009-10. (*See attached*) Mary Concepcion

**11. Information:** Discussion regarding the services and activities of Turning Point's Adult Program for PY 2009-10. (*See attached*) Deborah Carrillo

**ANNOUNCEMENTS OF EVENTS OR SERVICES** Mary Ann Leffel

#### Upcoming Oversight Meetings:

- February 11, 2010 (*Seaside One-Stop*)
- March 11, 2010 (*Seaside One-Stop*)

#### Upcoming WIB Meetings:

- February 3, 2010, Rancho Cielo
- April 7, 2010

### ADJOURN

Mary Ann Leffel

If requested, the agenda shall be made available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 USC Sec. 12132), and the federal rules and regulations adopted in implementation thereof. Information regarding how, to whom and when a request for disability related modification or accommodation, including auxiliary aids or services may be made by a person with a disability who requires a modification or accommodation in order to participate in the public meeting. To request information, please contact the Monterey County Workforce Investment Board staff at (831) 796-3313 or visit our website [www.montereycountywib.org](http://www.montereycountywib.org).



David Bernahl, II,  
WIB & Executive Chair

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WIB 1<sup>st</sup> Vice Chair

Joanne Webster,  
WIB 2<sup>nd</sup> Vice Chair

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## Monterey County Workforce Investment Board (WIB)

Contact Information

### Joseph Werner, WIB Executive Director

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### WIB Management Analysts:

Miguel Banda, (831) 796-3311, [bandam@co.monterey.ca.us](mailto:bandam@co.monterey.ca.us)

Manley Bush, (831) 796-3320, [bushm@co.monterey.ca.us](mailto:bushm@co.monterey.ca.us)

Marleen Esquerra, (831) 796-3381, [esquerraml@co.monterey.ca.us](mailto:esquerraml@co.monterey.ca.us)

Stephanie Shonley, (831) 796-3387, [shonleys@co.monterey.ca.us](mailto:shonleys@co.monterey.ca.us)



## Monterey County One-Stop Career Center Operators

Contact Information



### Office for Employment Training (OET)

Lynda Dunn, Deputy Director

Phone: (831) 796-3330

Email: [dunnl@co.monterey.ca.us](mailto:dunnl@co.monterey.ca.us)

Website:

[www.onestopmonterey.org](http://www.onestopmonterey.org)

### CalWORKs Employment Services (CWES), Community Action Partnership (CAP), Monterey County Child Care Planning Council (CCPC)

Barbara Verba, Deputy Director

Phone: (831) 796-1520

Email: [verbab@co.monterey.ca.us](mailto:verbab@co.monterey.ca.us)

Website:

<http://mcdses.co.monterey.ca.us>

### Employment Development Department (EDD)

Ruben Garcia, Manager

Phone: (831) 796-3632

Email: [RGarcia@edd.ca.gov](mailto:RGarcia@edd.ca.gov)

Website:

[www.edd.ca.gov](http://www.edd.ca.gov)

### Monterey County One-Stop Career Center Locations

#### Salinas One-Stop

Salinas Airport Business Park  
730 La Guardia Street  
Salinas, CA 93905  
(831) 796-3600

#### Seaside One-Stop

University Plaza Shopping Center  
1760 Fremont Blvd, Ste. D-2  
Seaside, CA 93955  
(831) 899-8236

#### King City One-Stop

Towne Square Shopping Center  
200 Broadway Street, Ste. 62  
King City, CA 93930  
(831) 386-6801

# **ACTION #1**

**Unadopted**  
**Minutes of the Monterey County Workforce Investment Board**  
**Oversight Committee Meeting**  
 Thursday, November 12, 2009, 8:30 A.M.  
**Seaside One Stop, 1760 Fremont Boulevard, Building D-2, Seaside, CA 93955**

<b>MEMBERS PRESENT</b>	<b>REPRESENTING</b>
Mary Ann Leffel ( <i>Chair</i> )	Business
Teresa Sullivan	Older Americans
Cesar Lara	Labor
Judith Profeta	Business
Michael Oprish	Business
Al Davis	Community Based Organization
Jim Nakashima	Housing
<b>MEMBERS ABSENT</b>	<b>REPRESENTING</b>
Loyanne Flinn	Acting WIB Executive Director, Ex-Officio Member
<b>OTHERS PRESENT</b>	<b>REPRESENTING</b>
Manley Bush	WIB Staff
Rosie Chavez	Turning Point
Wil Moore	Shoreline Workforce Development Services
Mary Concepcion	Arbor Career Center
Gloria Torrez	WIB Staff
Marleen Esquerria	WIB Staff
Lynda Dunn	OET Deputy Director
Harry Gamotan	OET
Doug Orlando	EDD

**CALL TO ORDER/INTRODUCTIONS:**

Mr. Nakashima called the meeting to order at 8:49am. He welcomed those in attendance and called for introductions from those present. A quorum was established. Ms. Leffel took over the meeting at 8:52am.

**CHANGES TO THE AGENDA:** Ms Leffel approved one change to the agenda. Information item 6 update on expenditures and activities as of September 30, 2009 or 1<sup>st</sup> Qtr 2009-10. A handout was passed out for Item #5.

**PUBLIC COMMENT:** None.

**BUSINESS MEETING:**

**1. Action:** Approve the minutes of the October 8, 2009 Oversight Committee meeting.

**Motion:** There was a motion to approve the October 8, 2009 minutes by Mr. Oprish

**Second:** Mr. Lara

**Motion passed unanimously**

**2. Action: Approve the Final Monitoring Report for the California Gang Reduction, Intervention, and Prevention (CalGRIP) program for PY2008-09.**

Ms. Dunn announced that in January the Governor approved continuation of funds for the Calgrip program.

**Motion:** There was a motion to approve the CalGRIP monitoring report for PY2008-09 by Ms. Profeta.

**Second:** Mr. Oprish

**Motion passed unanimously**

**3. Action: Approve the Final Monitoring Report for the Disability Program Navigator (DPN) program for PY2008-09.**

Mr. Bush presented his final monitoring report as provided in the packet. His report found that OET is underserved in its demographic enrollments. The committee wanted to know what is the process is when there is a finding in the monitoring. Ms. Bush replied that draft report is sent out to OET and they have fifteen days to respond to any findings or observations. In this case Ms. Dunn requested an extension which was given to her, yet a response was not received. Ms. Dunn stated that she is working on her response and she disagrees with several items in the monitoring report. She will have a response by the next meeting. Ms. Bush added that since Ms. Dunn did not respond the report was made final. Any response will now be a response to the final report.

Since no response has been given by Ms. Dunn on any of the monitoring reports, there was a discussion about carrying items 3, 4, 5, and 6 to the next Oversight Committee agenda. Ms. Dunn commented that the hand out given to the committee supports revision of the geographic policy and will be part of her response. Mr. Nakashima stated that the WIB needs to review the geographic goals and

make any recommended changes. Ms. Esquerra commented that the next Planning Committee will address this issue. Ms. Sullivan requested that the committee be given a report on any changes that are made to the demographic and geographic goals.

**Motion:** There was a motion by Ms. Sullivan to carry the item to the next agenda to review Ms. Dunn's response.

**Second:** Ms. Leffel

**Motion passed unanimously**

**4. Action: Approve the Final OET Monitoring Report for the Veterans Apprenticeship program for PY2008-09**

**Motion:** There was a motion to carry Action item 4, to the next agenda by Mr. Oprish.

**Second:** Mr. Lara

**Motion passed unanimously**

**5. Action: Approve the Final OET Monitoring Report for Formula Youth Program for PY2009-09**

**Motion:** There was a motion to carry Action item 5 to the next agenda by Mr. Oprish.

**Second:** Mr. Lara

**Motion passed unanimously**

**6. Action; Approve the Final Monitoring Report for ARRA Youth program for PY2008-09**

**Motion:** There was a motion to carry Action item 6 to the next agenda by Mr. Oprish.

**Second:** Mr. Lara

**Motion passed unanimously**

**7. Information: Review the Local Workforce Investment Area (LWIA) budget and One-Stop operational costs for PY 2008-09 and PY2009-10.**

Ms. Dunn stated that the 2009-10 plan to actual numbers reflect the first three months of this year. Mr. Nakashima wanted to know if Ms. Dunn had gone to the Board of Supervisors with her administrative plan for the ARRA funds. Ms. Dunn stated that the administrative plan is a state plan. Mr. Nakashima noted that the ARRA funds do not appear to have created the jobs for the money that is being spent. Ms. Dunn replied that OET has been monitored by the state and federal government, as well as the county single auditor with no discrepancies or findings. Ms. Sullivan asked if the monitors were looking at formula funding or ARRA funding, Ms. Dunn replied that they reviewed ARRA funding. Mr. Oprish commented that staff salaries and benefits seemed high and cost per participant seemed low this year. Ms. Dunn replied that before the end of the year the numbers will reflect the full picture and that cost per participant is low due to the increase in enrollments from 300 served last year to nearly 3000 this year.

**8. Information: Presentation of MIS and fiscal reports for WIA Title I Adult Subcontractors for PY 2009-10.**

Ms. Esquerra noted that her report is from September 30. Ms. Leffel wanted to know if the concentration of money spent is for recruitment. Ms. Chavez noted recruitment of participants and employers is the most important. Mr. Moore stated that 60% of their money goes to recruitment. Ms. Concepcion stated that for Arbor 40% is for recruitment. Ms. Sullivan asked about OJT opportunities. Ms. Chavez responded that for Turning Point the numbers are down, mostly due to the fact that their target population is individuals with convictions. Mr. Moore added that Shoreline and Arbor also serve people with convictions.

**9. Information: Discussion regarding the services and activities of Shoreline's Adult Program for PY 2009-10.**

Mr. Moore reported that since the report was printed he has increased enrollments by 6, Shoreline now has 37 OJT's. Mr. Moore recognized the advantages of being recipients of the CNA grant and the SET grant. They have used the funds from these grants to hire new staff and pay salaries. He asked committee members to refer businesses that need employees. Ms. Esquerra asked Mr. Moore to send her an email that includes information on the SET grant.

Mr. Moore asked that the WIB review the geographic policy that is currently in force. Ms. Leffel added that the geographic policy should be on the next Planning Committee agenda. Mr. Moore added that a change in the policy will allow the sub-contractors the opportunity to serve those that most need the services. The committee asked for clarification on the goal of the target populations. Mr. Moore replied that all the sub-contractors are expected to serve a certain population of people.

**10. Information: Discussion regarding the services and activities of Arbor's Adult Program for PY 2008-09.**

Ms. Concepcion reviewed the report provided and noted that she has two more OJT's pending. Ms. Leffel suggested that Arbor attend Sun Street Center meetings. Mr. Nakashima commented that Arbor's enrollments are low, especially in underserved geographic area.. The committee agreed that Ms. Concepcion needs to change her marketing campaign, in order to meet her geographic goals.

**11. Information: Discussion regarding the services and activities of Turning Point's Adult Program for PY 2008-09.**

Ms. Chavez reviewed the report submitted in the agenda. She added that enrollments in South County have increased partly because staff has been able to go out and recruit in underserved areas by closing the office periodically. Turning Point is experimenting with the benefits of this approach. In response to Ms. Leffel's question, Ms. Chavez responded that her office has three employees. She commented that she previously was unable to attend meetings at Sun Street Center due to confidentiality issues. Ms. Leffel suggested that the sub-contractors make flyers and post them in busy locales.

**ANNOUNCEMENTS OF EVENTS OR SERVICES:**

Ms. Esquerra announced that the sub-contractors are working to have WorkKeys by December. Ms. Leffel added that the Monterey Business council will have there annual gala on February 6, 2010 at the Inn at Spanish Bay.

**ADJOURNMENT:**

**Motion: There was a motion to adjourn the meeting by Ms Leffel**

**Second: Mr. Oprish**

**Ms. Leffel adjourned the meeting at 9:50.**

# **ACTION #2**

**Unadopted**  
**Notes of the Monterey County Workforce Investment Board**  
**Oversight Committee Meeting**  
 Thursday, December 10, 2009, 8:30 A.M.  
**Seaside One Stop, 1760 Fremont Boulevard, Building D-2, Seaside, CA 93955**

<b>MEMBERS PRESENT</b>	<b>REPRESENTING</b>
Teresa Sullivan	Older Americans
Jim Nakashima	Housing
Al Davis	Community Based Organization
Loyanne Flinn	Acting WIB Executive Director, Ex-Officio Member
<b>MEMBERS ABSENT</b>	<b>REPRESENTING</b>
Mary Ann Leffel ( <i>Chair</i> )	Business
Michael Oprish	Business
Cesar Lara	Labor
Judith Profeta	Business
<b>OTHERS PRESENT</b>	<b>REPRESENTING</b>
Manley Bush	WIB Staff
Rosie Chavez	Turning Point
Wil Moore	Shoreline Workforce Development Services
Mary Concepcion	Arbor Career Center
Gloria Torrez	WIB Staff
Bertha Gonzalez	OET
Lynda Dunn	OET Deputy Director
Harry Gamotan	OET

**CALL TO ORDER/INTRODUCTIONS:**

Mr. Nakashima called the meeting to order at 8:45am. He welcomed those in attendance and called for introductions from those present. A quorum was not established, no action was taken. Information items were presented.

**CHANGES TO THE AGENDA: None**

**PUBLIC COMMENT: None.**

**BUSINESS MEETING:**

**1. Action:** Approve the minutes of the November 12, 2009 Oversight Committee meeting.  
*Due to the lack of a quorum, this item has been deferred to the next meeting.*

**2. Action:** Approve the Final Monitoring Report for the Disability Program Navigator (DPN) program for PY2008-09.  
*Due to the lack of a quorum, this item has been deferred to the next meeting.*

**3. Action:** Approve the Final Monitoring Report for the Veterans Apprenticeship program for PY2008-09.  
*Due to the lack of a quorum, this item has been deferred to the next meeting.*

**4. Information: Review the Local Workforce Investment Area (LWIA) budget and One-Stop operational costs for PY 2008-09 and PY2009-10.**

Ms. Dunn stated that based on mid-year actual expenditures she plans to request some line item changes in January-February. She noted that she is seeing an increase of participants in Salinas and the Peninsula. She is planning to request that funds from dislocated worker be moved to adult. She added that we are allowed to move 50% of the funds either way. Mr. Davis commented that he is very pleased with the budget. Ms. Flinn added that the WIB received the performance goals which showed that we met or exceed 100% 8 of 9 performance goals. Mr. Bush added that Monterey County could receive an incentive award for meeting or exceeding the performance goals.

**5. Information: Presentation of MIS and fiscal reports for WIA Title I Adult Subcontractors for PY 2009-10.**

Mr. Bush reviewed the report adding that all of the subcontractors are on track. Mr. Bush noted that Shoreline will ask for a modification to move \$48,000 from staff salaries and benefits into OJT set aside. Mr. Bush added that Arbor and Turning Point will work with the AD&PR Committee to improve their outreach and recruiting process. Mr. Nakashima inquired about the process for line item changes.



Mr. Bush replied that if the subcontractors need to change a line item they should submit a request to WIB staff and they will have a response within one to two weeks. Ms. Sullivan inquired about the process for funds if they are unused by the sub-contractors after the fiscal year. Mr. Bush replied that the money goes back to OET. Ms. Dunn added that WIB action can move the funds to the other sub-contractors. Ms. Flinn added that moving money to support participants will generally be approved.

**6. Information: Discussion regarding the services and activities of Shoreline's Adult Program for PY 2009-10.**

Mr. Moore reviewed his report. Mr. Moore added that Shoreline has been able to expand in South County by working with the Soledad Healthcare District. Mr. Moore added that Shoreline's current participants served are in line with the unemployment rates of the geographic areas. He added that the WIB really needs to review the geographic goals. Mr. Nakashima inquired about the WIB's interest in changing these goals. Ms. Flinn replied that it will be on the next Planning Committee agenda. Mr. Moore added that Shoreline is a site for the Aging Digital Inclusion program in collaboration with the Alliance on Aging. The goal of this program is to teach older workers how to use computers. Ms. Sullivan added that the program takes six weeks to complete and she asked the committee to refer people who are interested. In response to Ms. Sullivan question Mr. Moore stated that he is supporting the Monterey Adult Schools' CNA training program with 15% discretionary grant funds. Mr. Moore presented the SET program at the Marina Technology Cluster to small business operators.

**7. Information: Discussion regarding the services and activities of Arbor's Adult Program for PY 2009-10.**

Ms. Concepcion reviewed her report. She added that Arbor does not enroll participants until they have an OJT for them. However, they will help the participant with other services. She added they are primarily serving Ex-offenders. Ms. Concepcion commented that Arbor will keep working on their marketing strategies. She hopes that with a new marketing plan they will be able to meet their goals.

**8. Information: Discussion regarding the services and activities of Turning Point's Adult Program for PY 2009-10.**

Ms. Chavez reviewed her report. She added that participants in North County have expressed interest in training opportunities. Most of the customers are limited English-speaking, interested in moving on from being field workers, but often do not have right to work status. Ms. Sullivan asked if Turning Point was marketing to large or small employers. Ms. Chavez responded that they have more success working with smaller employers. Ms. Sullivan added that Turning Point should see about working with Salinas United Business Association (SUBA).

**ANNOUNCEMENTS OF EVENTS OR SERVICES:**

Ms Dunn introduced Ms. Gonzalez, Management Analyst for OET; she will be doing the reporting to the Oversight Committee.

**ADJOURNMENT:**

Mr. Nakashima adjourned the meeting at 9:25

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# **ACTION #3**

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** APPROVE THE FINAL MONITORING REPORT OF OFFICE FOR  
EMPLOYMENT TRAINING'S (OET) DISABILITY PROGRAM NAVIGATOR  
(DPN) PROGRAM GRANT FOR PY 2008-09  
**DATE:** JANUARY 14, 2010

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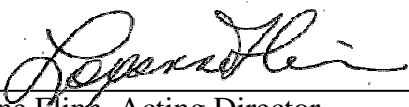
**DISCUSSION:**

The monitoring review of OET's DPN grant for program year 2008-09, covered the period of July 1, 2008 – June 30, 2009. The focus of this review was to evaluate compliance with the provisions of the Workforce Investment Act associated regulations, directives and the provisions of the contract. Information collected for this report was obtained through review of the Disability Program navigator Grant, MIS reports, correspondence, general ledger, and staff payroll. This information was used to determine adequate fiscal controls and programmatic compliance.

A draft monitoring report was issued to OET on August 27, 2009. There were one observation and one finding noted. The final monitoring report was issued to OET on October 24, 2009. WIB staff received OET's response to the final report on December 2, 2009 and has accepted OET's corrective action response to the final monitoring report for both the observation and finding noted in the report. No further action will be necessary. However, WIB staff will validate OET's successful implementation of its stated corrective action at a future on-site visit.

**ATTACHMENTS:**

3a.OET's 2008-09 FINAL Disability Program Navigator grant Monitoring Report (3 pages)

  
\_\_\_\_\_  
Loyanne Flinn, Acting Director

Monterey County Workforce Investment Board

This report was written by: Manley Bush, WIB Management Analyst

01/05/2010

\_\_\_\_\_  
Date

# WORKFORCE INVESTMENT BOARD

## MONTEREY COUNTY

DAVID BERNAHL, II, CHAIR

JOSEPH WERNER, EXECUTIVE DIRECTOR



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wernerj@co.monterey.ca.us

December 2, 2009

Lynda Dunn, Deputy Director  
Office for Employment Training  
730 La Guardia Street  
Salinas, CA 93905

### **FINAL OET Disability Program Navigator (DPN) Grant Monitoring Report for PY2008-09**

Dear Ms. Dunn:

This is to report the results of our contract compliance monitoring for the Workforce Investment Act (WIA) Title I activities performed by the Office for Employment Training for the Disability Program Navigator Grant. The monitoring review covered the period of July 1, 2008 – June 30, 2009 and focused on the areas of program oversight and fiscal expenditures.

The purpose of this review was to evaluate compliance with the provisions of the Workforce Investment Act, associated regulations, directives and the provisions of the contract. Information collected for this report was obtained through, review of the Disability Program Navigator Grant, MIS reports, correspondence, the general ledger, and staff payroll. This information was used to determine adequate fiscal controls and programmatic compliance.

### **GRANT SUMMARY**

The Monterey County Workforce Investment Board (MCWIB) in collaboration with the Office for Employment Training (OET) submitted a grant request to the State of California EDD to fund the DPN for the sixth consecutive year, in the amount of \$170,600. Monterey County's request for grant funding was approved, however, due to a reduction in grant funds available, the funding was significantly reduced to \$72,000. On July 28, 2008 the State of California EDD awarded the MCWIB \$72,000. The term of the grant is from July 1, 2008 through June 30, 2009.

### **DESK REVIEW**

This year's navigator Work Statement was structured to have broad strategic goals for services. These services include a Comprehensive Action Plan focused on Coordinating plans regarding the multiple programs, systems and services that impact the employability, employment, and career advancement of adults and youth with disabilities, including formation of a Disability Advisory Committee(s) and implementing Integrated Resource Teams. Also, improve the status of accessibility requirements in the One-Stop Career Center system and plans to address deficiencies. Other considerations include outreach to the employer community, plans for becoming an Employment Network (EN) and other means of sustainability. In terms of internal systems development, include a collection of quantitative data and achieving outcome goals and a description of program design that ensures the states' Navigators is within the workforce and positioned to carry out the requirements of the DPN initiative.

The Office for Employment Training's performance and expenditures plan vs. actual was reviewed for compliance with the contract plan for the period July 1, 2008 – June 30, 2009.

DPN Expenditures Plan vs. Actual July 1, 2008 – May 31, 2009	TOTAL		
	Plan	Actual	%
A. Salary and Benefits	\$64,800	\$37,128	57%
B. Overhead	-	\$27,672	-
C. Admin	\$7,200	\$7,200	100%
<b>Totals</b>	<b>\$72,000</b>	<b>\$72,000</b>	<b>100%</b>

### **FIELD REVIEW**

WIB Staff reviewed the Disability Program Navigator (DPN) deliverables, year-end report to the Disability Advisory Committee (DAC) for the period July 1, 2008 through – June 30, 2009 and the DAC Committee minutes for the periods July 2008 thru May 2009. The total number of OET disabled adult participants enrolled from July 1, 2008 to June 30, 2009 is: 1964 (ARRA Dislocated Worker 5 of 123 or 4%; ARRA Adult 17 of 169 or 10%; Veterans Dislocated 3 of 30 or 1%; Veterans Adult 8 of 51 or 16%; OET Dislocated Worker 501, 23 of 712 or 3%; Dislocated Worker Augment 1 of 8 or 12%; Adult Low-income 71 of 871 or 8%.) The total disabled adult population served by OET is 6.5%. The California Department of Rehabilitation (DOR) during the same time period above referred 36 applicants to the One-Stop Career Center.

DPN Staff Time Distribution	July thru September 2008 – March thru May 2009						
	Hours Worked						
	Jul 08	Aug 08	Sep 08	Mar 09	Apr 09	May 09	Total Hours
Disability Program Navigator	20	57	32	36	40	40	225
OET Management Analyst	62	84	56	0	0	0	202
<b>Work Hours Charged to Grant</b>	<b>82</b>	<b>141</b>	<b>88</b>	<b>36</b>	<b>40</b>	<b>40</b>	<b>427</b>

WIB Staff conducted a sampling of two pay periods on the number of hours OET charged to the DPN grant from, July 2008 thru September 2008 and March thru May 2009. The total hours charged to the grant was 427. The OET analyst charged 202 hours to the grant. The DPN activities that the OET Analyst participated in during the March thru May 2009, include the monthly DAC meeting in March 2009; collaboration with OET Business services and provide program media information on DPN services to the community event sponsored by the mental health services in May 2009. During this period it was noted that the OET Analyst did not charge time to the DPN grant. Total Salaries for the assigned staff during the same period was \$22,141.42.

**EXIT BRIEFING:** Exit briefing was conducted with Lynda Dunn, OET Deputy Director on Tuesday, July 8, 2009

**Observation:** The OET Analyst year end report to the Disability Advisory Committee (DAC) indicated during May 2009, Both OET DPN staff participated in disability navigator related community event and Business services collaboration. Also the DAC Committee met in March 2009. However no time distribution and salaries were charged to the DPN grant during the period March thru May 2009 by the OET Analyst. Both OET analyst and DPN were allowed to charge 25% or 40 hours of their time a month to the grant.

**Recommendation:** The OET Analyst staff should refer to the DPN grant budget summary report on recommended or planned salary expenditures by month. Also time distribution should be allocated based on the amount of the work product or major activities actually performed.

**OET Response:** Based on the reduced budget, the funds available were spent prior to March, 2009. After the grant was fully spent, the analyst's hours are distributed to a program pool which is distributed to all program grants. As suggested in the recommendation, time distribution is based on the actual work product until funds were spent.

**WIB Response:** OET's corrective action measures to address the DPN Analyst time distribution issue is considered sufficient. No further action is required. This observation is closed.

**Finding:** As of June 30, 2009 the state JTA report reflected that OET is underserved in the Demographic enrollments for Disabled as required by WIB Policy 2005-4. Demographic goals not met are Disabled 16%, actual 6.5%. The combined total Adult and Dislocated Worker enrollments which include ARRA Dislocated Worker, ARRA Adult, Veterans Dislocated 513 and Adult 675, Dislocated Worker 501 and Adult 201 is 1,964 enrollments. The total number of individuals with disabilities is 128 (1,964/128= 6.5%). To meet the required contract goal for individuals with disabilities, OET will need to increase their enrollments by 9.5% or 186 participants. OET will need to implement a more effective outreach strategy to identify and document individuals with disabilities.

**Recommendation:** Corrective action plan must be submitted to WIB staff that demonstrates OET's actions to improve outreach to the areas noted in this finding.

**OET Response:** OET does make an effort to identify customers who are disabled and offer them services through the DPN; however, many of our customers choose not to disclose disabilities they may have. It is interesting to note that 7.10% of all customers enrolled so far this year has been identified as disabled. We will continue to monitor this trend. Staff is currently receiving additional training to identify disability status on the application form as a priority in order to get more accurate readings on the numbers of disabled customers we are serving. We will also continue to work with WIB staff to better publicize our services to the disabled in the community. We have been without a Vocational Rehab partner in the One Stops for some time but will be meeting with a new person on their staff in the coming weeks.

**WIB Response:** OET's corrective action measures to address the demographic enrollments for disabled are considered sufficient. No further action is required. However, WIB staff will validate during a future on-site visit, OET successful implementation of its stated corrective action.

### **FINANCIAL ACCOUNTING INTERNAL CONTROLS**

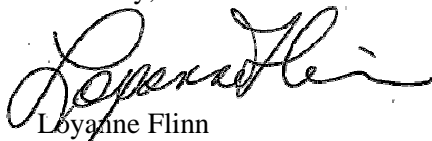
A sample of expenditures was reviewed to assess accurate application of cost allocation, timely posting, and adherence to established fiscal procedures. **No Discrepancies were noted**

### **CONCLUSION**

Because the methodology for our monitoring review included sample testing, this report is not a comprehensive assessment of all of the areas included as part of your, program and fiscal operations. As you know, it is your responsibility to ensure that your 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 your responsibility.

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,



Lorraine Flinn  
Aging Executive Director  
Monterey County Workforce Investment Board

cc: Manley Bush, WIB Management Analyst  
WIB Monitor File

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# **ACTION #4**

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** APPROVE THE FINAL MONITORING REPORT OF OFFICE FOR  
EMPLOYMENT TRAINING'S (OET) VETERANS APPRENTICESHIP  
PROGRAM GRANT FOR PY 2008-09  
**DATE:** JANUARY 14, 2010

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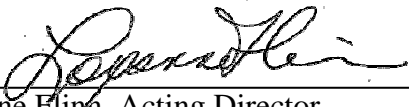
**DISCUSSION:**

The monitoring review of OET's DPN grant for program year 2008-09, covered the period of October 1, 2008 – March 31, 2009. The focus of this review was to evaluate compliance with the provisions of the Workforce Investment Act associated regulations, directives and the provisions of the contract. Information collected for this report was obtained through review of the Veterans Apprenticeship Grant, MIS reports, correspondence, general ledger, and staff payroll. This information was used to determine adequate fiscal controls and programmatic compliance.

A draft monitoring report was issued to OET on August 27, 2009. There was one observation noted. OET received a final monitoring report on October 24, 2009. WIB staff received OET's corrective action response to the final report on December 2, 2009. WIB staff has accepted OET's response to the final monitoring report and no further action will be necessary. This issue is considered closed.

**ATTACHMENTS:**

4a.OET's 2008-09 FINAL Veterans Apprenticeship grant Monitoring Report (3 pages)

  
\_\_\_\_\_  
Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board  
This report was written by: Manley Bush, WIB Management Analyst

01/05/2010  
\_\_\_\_\_  
Date

# WORKFORCE INVESTMENT BOARD

## MONTEREY COUNTY

DAVID BERNAHL, II, CHAIR  
JOSEPH WERNER, EXECUTIVE DIRECTOR



730 La Guardia Street  
P.O. Box 2135  
Salinas, CA 93902  
Phone (831) 759-6644  
Fax (831) 796-3512  
wernerj@co.monterey.ca.us

December 2, 2009

Lynda Dunn, Deputy Director  
Office for Employment Training  
730 La Guardia Street  
Salinas, CA 93905

### **FINAL OET WIA Veterans Apprenticeship Program Grant Monitoring Report for PY2008-09**

Dear Ms. Dunn:

This is to report the results of our contract compliance monitoring for the Workforce Investment Act (WIA) Title I activities performed by the Office for Employment Training for the Veterans Employment Related Assistance Program Grant. The monitoring review covered the period of October 1, 2008 – March 31, 2009 and focused on the areas of program oversight and fiscal expenditures.

The purpose of this review was to evaluate compliance with the provisions of the Workforce Investment Act, associated regulations and directives. Information collected for this report was obtained through, review of the Veterans Grant, MIS and fiscal reports, and correspondence. This information was used to determine adequate fiscal controls and programmatic compliance.

### **GRANT SUMMARY**

The State of California Employment Development Department (EDD), on January 25, 2007 announced awards from the Governor's 15% and 25% discretionary grants. Monterey County requested and received grant funds totaling \$500,000 (\$400,000 of 15% funds and \$100,000 of 25% funds) to assist veterans with apprenticeships, internships and training to secure employment in the construction, healthcare and protective services industries in high-need and high-wage occupations, for the grant period of September 1, 2008 through March 31, 2009. The grant target populations include eligible spouses of veterans, veterans who have significant barriers to employment, veterans returning from war in Iraq, and recently separate veterans within 48 months of discharge, especially those who served shorter terms and reservists.

### **DESK REVIEW**

Combined OET Budget Plan	9/1/08 – 3/31/09		
	Plan	Actual	%
A. Salary and Benefits	\$188,745	\$178,866	95%
B. Overhead	\$55,335	\$55,842	101%
D. Training	\$185,504	\$84,386	45%
E. Supportive Services	\$20,416	\$25,926	127%
E. Administration	\$50,000	\$50,000	100%
<b>Totals</b>	<b>\$500,000</b>	<b>\$395,020</b>	<b>79%</b>

Combined Expenditure Plan vs. Actual	9/1/08 – 3/31/09			
	Plan	Actual	%	Unspent
Total Expenditures				
Adults (Grant Code 675)	\$400,000	\$313,476	78%	\$86,524
Dislocated Worker (Grant Code 513)	\$100,000	\$81,544	82%	\$18,456
Total	\$500,000	\$395,020	79%	\$104,980

Participant Plan vs. Actual	9/1/08 – 3/31/09		
	Plan	Actual	%
Planned Enrollments – Adults	50	52	104%
Planned Enrollments – DW	18	29	161%
Core Services – Adults	50	50	100%
Core Services – DW	18	27	150%
Intensive Services – Adults	50	33	66%
Intensive Services – DW	18	19	106%
Training Services – Adults	29	20	69%
Training Services – DW	8	2	25%
Entered Unsubsidized Employment – Adults	40	4	18%
Entered Unsubsidized Employment – DW	15	2	25%

OET's performance was reviewed for compliance with the contract plan for the period October 1, 2008 through March 31, 2009. OET's total actual expenditures are \$395,020 (79%) of their total budget of \$500,000. The OJT and Work Experienced set aside amount of \$35,000 and \$34,992 respectively remained unspent. Supportive Service expenditures are \$8,897 (59%) of their total budget of \$20,416. Participant support services include, work and business clothing, transportation, tools, vehicle maintenance and child care. OET's total enrollments are 81 (119%) of their total planned goal of 68 participants. There were No OJT or Work Experience enrollments. There were 46 of 81 exits with 6 (13%) placed into unsubsidized employment. Of the 46 exits, 6 have obtained a certificate or credential. The remaining 35 veterans were co-enrolled into WIA Title I Adult Programs following the expiration of the grant. The remaining 26 of 35 participants were soft exits. As of June 30, 2009, nine participants continue to receive training services or job search assistance.

**EXIT BRIEFING:** An exit interview was conducted with Ms. Lynda Dunn, OET Deputy Director on Thursday, May 21, 2009.

**FIELD REVIEW:**

**File Review**

A file review sampling was conducted of 10 (5 Adult and 5 D/W) Adult and Dislocated Worker files or approximately 12% of active participant case files enrolled in the Adult Services Program. The file monitoring review included eligibility, assessment, and case-management, supportive services and incentive payments. OET was sent a by name list of the files that were reviewed and the results of each file in a separate correspondence.

**REVIEW RESULTS**

**Observation:**

- The case notes in 2 files had gaps in service delivery that exceeded 90 days since the last entry. One file had notes with a 5 month gap and another file with a 9 month gap since the last entry.

- One participant received supportive services reimbursement for mileage with an expired vehicle registration. (transaction date was March 13, 2009; vehicle registration expired on March 3, 2009).

**Recommendation:** OET should submit a corrective action plan that includes a strategy and administrative oversight of these services. The strategy should include an ongoing and continuous improvement plan with feedback provided to program supervisors responsible for approving the file review.

**OET Response:** OET staff now use a monthly report to review cases that show 30 days with no service. These reports are reviewed by case managers and supervisors so that lapse in services is prevented whenever possible. Staff have also received additional training on the support services policy.

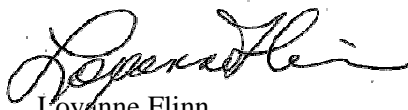
**WIB Conclusion:** The OET corrective action response should be sufficient to resolve this issue and no further corrective action are required. However, we cannot close this issue until we verify, during a future on-site visit, OET's successful implementation of its stated corrective action.

**CONCLUSION:**

Because the methodology for our monitoring review included sample testing, this report is not a comprehensive assessment of all of the areas included as part of your, program and fiscal operations. As you know, it is your responsibility to ensure that your 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 your responsibility.

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,



Lorraine Flinn  
Acting Executive Director  
Monterey County Workforce Investment Board

cc: Manley Bush, WIB Management Analyst  
WIB Monitor File

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# **INFORMATION #5**

MONTEREY COUNTY OFFICE FOR EMPLOYMENT TRAINING  
ENROLLMENTS, ACTIVITIES AND EXPENSES

JULY THROUGH NOVEMBER, 2009

	DWKR FORMULA	DWKR ARRA	DWKR STIMULUS	ADULT FORMULA	ADULT ARRA	ADULT TOTALS	YOUTH FORMULA	YOUTH ARRA	YOUTH TOTALS
CARRY-IN	63	77	8	45	71	108	38	536	
ENROLLMENT	669	272	6	570	280	1,239	71	79	
TOTAL PARTICIPANTS	<b>732</b>	<b>349</b>	<b>14</b>	<b>615</b>	<b>351</b>	<b>1,361</b>	<b>109</b>	<b>615</b>	<b>686</b>
<b>ACTIVITIES</b>	4,688	1,122	50	2,662	1,082	9,604	134	3,885	4,019
WK EXP	-	61		49	67	177	57	554	565
OJT	1	10		7	4	22			-
CRT	2	50	6	-	36	94	4	4	8
JOB REF/DEV	244	126	1	257	342	970	14	27	41
YEAR TO DATE EXP OBLIGATIONS	\$ 339,141	\$ 1,053,725	\$ 54,098	\$ 465,709	\$ 833,489	\$ 2,746,162	\$ 527,941	\$ 1,547,353	
						\$ -			
						\$ -			
TOTAL	\$ 339,141	\$ 779,799	\$ 25,882	\$ 465,709	\$ 833,489	\$ 2,444,020	\$ 527,941	\$ 1,547,353	\$ 2,075,294
COST PER PARTICIPANT	\$ 463	\$ 2,234	\$ 1,991	\$ 757	\$ 2,375	\$ 1,796	\$ 4,843	\$ 2,516	\$ 3,025
COST PER ACTIVITY	\$ 72	\$ 695		\$ 175	\$ 770	\$ 254	\$ 3,940	\$ 398	
COST PER WORK EXP.							\$ 2,793		\$ 3,673
<b>EMPLOYER SERVICES</b>									
JOB ORDER ASSISTANCE					468				
CANDIDATE PRE-SCREENING					44				
REVIEW RESUMES AND MAKE REFERRALS					29				
REFERRED QUALIFIED APPLICANTS					76				
<b>GEOGRAPHIC REGION %</b>			<b>NEW GOALS</b>						
Central			55%			65%			52%
North County			11%			3%			8%
South County			18%			12%			24%
West County			16%			18%			16%
Unknown or Out of County						2%			0

Adult and Dislocated Worker participants are first enrolled in Formula Grants and then co-enrolled into the ARRA funds for Intensive and Training Services. The total number of adults counted does not include all 5 columns since that would be double counting many of the participants.

Activities are recorded separately in each grant based on the type of service. Core and basic intensive services in the One Stops are reported as Formula Fund Services. Work experience, and other training services as well as support services are most often reported in the ARRA funding grants.

*(The WK EXP (Work Experience), OJT (On-the-Job Training), CRT (Classroom Training), and JOB REF/DEV (Job Referrals and Development) are included in the ACTIVITIES line above)*



# INFORMATION #6

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** PRESENTATION OF FISCAL REPORTS FOR WIA TITLE I ADULT  
SUBCONTRACTORS FOR PY 2009-10  
**DATE:** JANUARY 14, 2010

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**INFORMATION/DISCUSSION:**

WIB staff plans to present an update, as available, on fiscal plan vs. actual performance reports for Title I Adult subcontractors for program year 2009-10. Arbor and Turning Point have reported their expenditures at 42% of their Quarterly plan goal as of November 30, 2009, while Shoreline remains at 33% of their planned quarterly goal, as of October 31, 2009.

Subsequent to this report, the adult subcontractors will be given an opportunity to present a verbal update to the Oversight Committee regarding their program and performance for 2009-10.

**ATTACHMENTS:**

Attachment 6a – Consolidated Fiscal Report for Subcontractors (1 page)



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Loyanne Flinn, Acting Director

Monterey County Workforce Investment Board

This report was written by: Manley Bush, WIB Management Analyst

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01/05/2010

Date

**Adult Subcontractors  
Program Year 2009-10**

<i>Program Year 2009-10</i>		Arbor Adult	Shoreline Adult	Turning Point Adult
<b>Expenditures</b>		<b>11/30/09</b>	<b>*10/31/2009</b>	<b>11/30/09</b>
<b>Total Expenditure</b> <i>(Less OJT Expenditures)</i>	<b>Actual</b>	\$81,550	\$81,085	\$107,076
	<b>Plan (Oct 42%)</b>	\$88,824	\$91,277	\$139,405
	<i>Total Plan</i>	\$211,485	\$276,598	\$331,917
	<b>% of Qtr Plan</b>	<b>92%</b>	<b>89%</b>	<b>77%</b>
<b>OJT Expenditure</b>	<b>Actual</b>	\$7,928	\$34,439	\$16,077
	<b>Plan (Oct 42%)</b>	\$19,326	\$20,098	\$30,695
	<i>Total Plan</i>	\$46,015	\$60,902	\$73,083
	<b>% of Qtr Plan</b>	<b>41%</b>	<b>171%</b>	<b>52%</b>
<b>Supportive Services Expenditure</b>	<b>Actual</b>	\$525	\$8,057	\$4,314
	<b>Plan (Oct 42%)</b>	\$3,284	\$4,711	\$8,484
	<i>Total Plan</i>	\$7,820	\$14,275	\$20,200
	<b>% of Qtr Plan</b>	<b>16%</b>	<b>171%</b>	<b>51%</b>
<b>Staff Salaries and Benefits</b>	<b>Actual</b>	\$58,159	\$66,339	\$71,920
	<b>Plan (Oct 42%)</b>	\$58,378	\$78,841	\$90,816
	<i>Total Plan</i>	\$138,995	\$238,913	\$216,228
	<b>% of Qtr Plan</b>	<b>100%</b>	<b>84%</b>	<b>79%</b>

\* **Note:** As of the November 30, 2009 monthly reporting period, Shoreline's Expenditures are only up to October 31, 2009

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# **INFORMATION #7**

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** DISCUSSION AND UPDATE REGARDING THE ELIGIBLE TRAINING PROVIDER LIST (ETPL) FOR PY 2009-10  
**DATE:** JANUARY 14, 2010

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**INFORMATION/DISCUSSION:**

The Workforce Investment Act emphasizes on informed customer choice, performance accountability, and continuous improvement. These goals are achieved through the Eligible Training Provider List (ETPL), a directory of training providers eligible for referrals, and WIA training funds. WIB staff will present performance data to be reviewed and considered in assessing the quality of training services being provided by training providers currently serving clients of the Monterey County's Local Workforce Investment Area (LWIA).

**ATTACHMENT:**

7a. Classroom Training Project Study (two pages)



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Loyanne Flinn, Acting Director

Monterey County Workforce Investment Board

This report was written by: Miguel Banda, WIB Management Analyst

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01/14/2010

Date

#7a

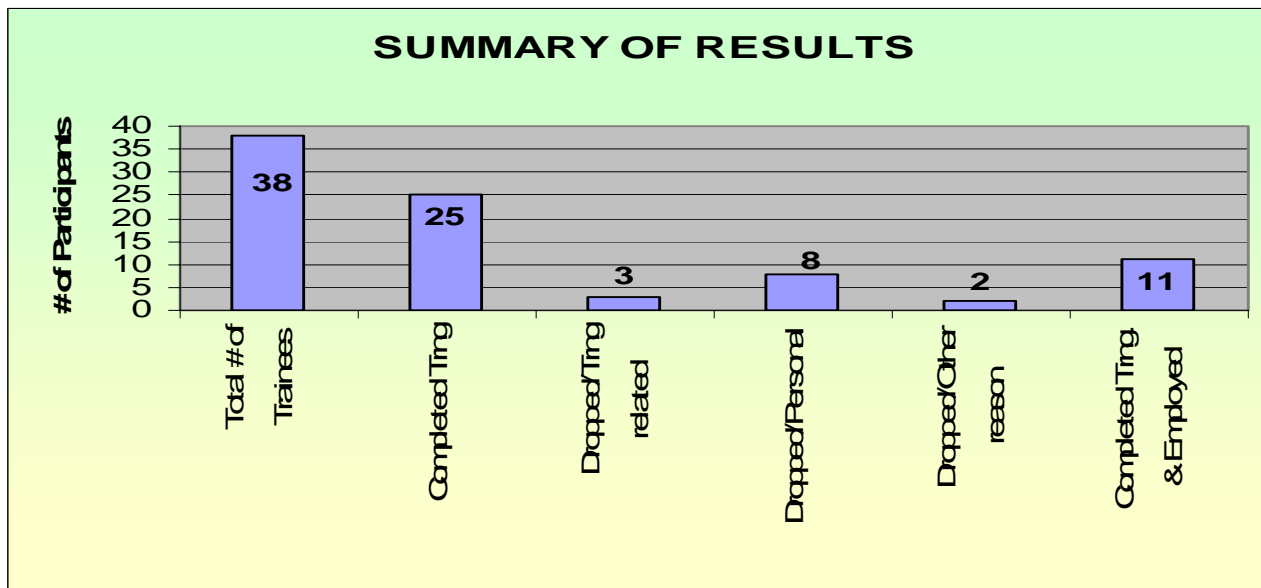
**CLASSROOM TRAINING REPORT**

**Purpose:** To determine the effectiveness of classroom training with regard to employability and self-sufficiency.

**Methodology:** A sample consisting of all OET customers who completed classroom training during the period of 01/01/2009 through 11/30/2009 was utilized for this report. Information was obtained through review of case notes, activity records and exit data from The Virtual One-stop automated case management system.

**Results:**

Following are observations organized by school and type of training.



#7a

### **Classroom Training Project Observations**

#### **Higher Power Aviation**

This training provided the necessary pilot certification in order for the customer to obtain needed pilot certification to become employed in a training related job.

#### **Shoreline Culinary**

Both students achieved a certificate of training completion. Upon completion of the training activity, one student declined job search assistance due to the birth of a child. The other student was recorded as employed in a training related job upon completion of the training activity.

#### **Central Coast College Medical Assisting**

The three students who received a certificate of completion were recorded as employed in training related jobs upon completion of the training activity. Two of the three customers who dropped out of training did so due to unforeseen personal circumstances. The customer who did not receive a certificate of completion for training related reasons did so due to the difficulty level of course material. Central Coast College accepted this individual into the Medical Assisting program knowing the customer was basic skills deficient in math. Math remediation provided by Central Coast College did not meet the needs of the customer who had to drop from the program prior to completion of training.

### **Classroom Training Project Conclusion/Recommendations**

The results of this study demonstrate that some vendors of classroom training are not providing the necessary tools to improve customer employability or economic self-sufficiency. However, since the data utilized to determine employment status and economic self sufficiency was obtained from base wage reports provided by the State of California Employment Development Department (delayed by at least six months of actual earnings), it is not practical to predict the impact of classroom training on long-term employability and economic self-sufficiency.

An area in need of improvement for all providers of training which include an externship as part of their program is the availability of appropriate sites for students. In many instances, the completion of training was delayed due to a lack of an available externship opportunity. It is recommended that schools either be required to match students with an externship opportunity at the time of entering into a training contract or offer a reduction in tuition to allow for the additional time needed for OET staff to develop an externship site.

A final recommendation is that assessment staff ensure customers pass all entry exams required by a vendor prior to considering the training. Although some schools offer remediation for students who do not meet enrollment eligibility standards, data reviewed for this study established such assistance as inadequate.



\_\_\_\_\_  
Lorraine Flinn, Acting Director

Monterey County Workforce Investment Board

This report was written by: Miguel Banda, WIB Management Analyst

\_\_\_\_\_  
01/14/2010

Date



# **INFORMATION #8**

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** DISCUSSION AND UPDATE REGARDING THE WORKFORCE INVESTMENT BOARD (WIB) MEMBERSHIP ATTENDANCE FOR PY 2009-10  
**DATE:** JANUARY 14, 2010

---

**INFORMATION/DISCUSSION:**

Members who serve and volunteer on the Monterey County WIB are given a clear and vital opportunity to contribute to Monterey County's vision of a healthy community, economy and future.

All nominations considering membership on the Monterey County WIB are forwarded to the Monterey County WIB's Executive Committee for consideration and approval. Once approved, the recommendation will be forwarded to the full WIB for concurrence, and then submitted to the Monterey County Board of Supervisors (BOS) for final consent. The BOS is authorized, as the chief elected official in the local area, to appoint all members to the Monterey County WIB.

The Workforce Investment Act (WIA) states that local membership on the MCWIB shall include:

- Representatives in the local area who are business owners, must make up the majority of the MCWIB.
- At least three representatives of local educational entities, local school boards, post-secondary educational institutions.
- At least two representatives of community-based organizations.
- At least two representatives of economic development agencies including private sector.
- One or more representatives of each One-Stop partner.
- At least 15 percent of local board members shall be representatives of labor organizations unless the local labor federation fails to nominate enough members (SB293).

Ms. Loyanne Flinn acting Executive Director will provide committee members an update on the current status of each WIB member.

**ATTACHMENT:**

8a.Local WIB Attendance Roster



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Loyanne Flinn, Acting Director

Monterey County Workforce Investment Board

This report was written by: Manley Bush, WIB Management Analyst

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01/05/2010

Date

**Monterey County Workforce Investment Board**  
**Membership Attendance - January - December 2009**

1.	Aniello, Anthony	02-13-2007	100%		50%		75%	
2.	Barroso, Blas	09-01-2009	n/a				n/a	Attendance starts January 2010
3.	Bastis, Mark	04-17-2007	80%				80%	
4.	Bernahl, David	02-21-2006	100%	91%			95%	
5.	Berry-Wahrer Diane	09-15-2009	n/a				n/a	Attendance starts January 2010
6.	Brickman, Wendy	04-14-2007	60%			100%	80%	
7.	Brower, Robert	05-29-2001	100%	73%			86%	
8.	Carrillo, Diana	05-29-2001	80%	82%		88%	83%	
9.	Castillo, Maria	10-27-2009	n/a				n/a	Attendance starts January 2010
10.	Chidlaw, Chris	06-19-2007	20%			100%	60%	
11.	Coyne, Linda	10-12-2004	100%			50%	75%	
12.	Culcasi, James	01-09-2007	40%				75%	58%
13.	Cushman, Erik	01-04-2005	100%	55%	83%		79%	
14.	Davis, Al	PIC	100%			82%	91%	
15.	Gamotan, Harry	04-13-2004	80%				75%	78%
16.	Garrison, Dr. Douglas	08-28-2007	60%					60%
17.	Gillis, Richard	02-21-2006	60%		67%		63%	
18.	Grover, Scott	10-12-2004	100%			100%	100%	
19.	Helm, Phoebe	02-10-2009	75%				75%	
20.	Hutchinson, Mike	08-19-2008	80%				80%	
21.	Lara, Cesar	06-19-2007	60%			73%	66%	
22.	Leffel, Mary Ann	05-29-2001	60%	82%		64%	68%	
23.	Munoz, Salvador	06-19-2007	100%			100%	100%	
24.	Nakashima, Jim	05-29-2001	60%			73%	66%	
25.	Oprish, Michael	01-04-2005	60%			45%	53%	
26.	Palacio, Lupe	06-19-2007	40%				63%	51%
27.	Potter, Dave	04-14-2009	33%					33%
28.	Profeta, Judith	06-19-2007	100%			91%	95%	
29.	Robinson, Elliott	06-24-2008	80%				80%	
30.	Rubio, Ralph	07-14-2005	20%				20%	
31.	Scherpinski, Ken	09-01-2009	n/a				n/a	Attendance starts January 2010
32.	Sullivan, Teresa	04-14-2007	80%			82%	81%	
33.	Verbonich, Mark	PIC	60%		100%		80%	
34.	Weakley, Robert	01-09-2007	80%	73%	100%		84%	
35.	Webster, Joanne	01-06-2004	80%	64%			72%	

**Youth Council Members Only**

1.	Bangs, Randy	06-19-2007				100%	100%	
2.	Brennand, Vivian	10-17-2006				88%	88%	
3.	Carter, Patricia	02-10-2009				71%	71%	
4.	Chapman, Andre	12-07-2004				63%	63%	
5.	Brown, Pamela	06-21-2005				13%	13%	Personal Leave
6.	Gonzalez, Mark	06-21-2005				75%	75%	
7.	Harper, Bob	11-18-2008				88%	88%	
8.	Morales, Judy	01-22-2002				25%	25%	
9.	Natalie Garcia	10-27-2009				50%	50%	Attendance started in December
10.	Ward-Kaiser, Cheryl	01-09-2007				75%	75%	

As stated in the MCWIB Bylaws, a member shall be deemed to have abandoned, relinquished and otherwise resigned from his/her position on the LWIB upon the review of absences by the LWIB staff which determine that the member has had three (3) consecutive and unexcused absences from regularly scheduled meetings of the LWIB Board or its committees, or sixty (60%) of such meetings in any calendar year.

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# **INFORMATION #9**

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** DISCUSSION AND REVIEW REGARDING THE SERVICES AND ACTIVITIES OF SHORELINE'S ADULT PROGRAM FOR PY2009-10  
**DATE:** JANUARY 14, 2010

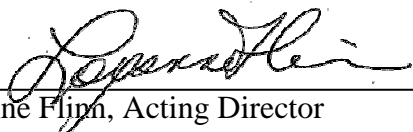
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**DISCUSSION:**

On Thursday, January 14, 2010, Mr. Moore will present a monthly update for December 2009 to the Oversight Committee on the status of enrollments and On-The-Job Training (OJT), plan vs. actual goals. Mr. Moore will also be reporting out on the Number of Placements by Industry Clusters, Geographical Areas Served, Target Population Served, Current Performance goals and Upcoming Activities.

**ATTACHMENTS:**

Mr. Moore will provide Oversight Committee members a handout on Shoreline's services and activities.



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Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board

This report was written by: Manley Bush, WIB Management Analyst

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01/05/2010  
Date

# INFORMATION #10



**Monterey County Workforce Investment Board**  
**Workforce Investment Act (WIA) Title I – Adult Subcontract Monthly Report**  
*On-the-Job Training (OJT)*

**Subcontractor / Program:** Arbor Career Center – OJT Adult Program

**For the period ending:** December 31, 2009

**ENROLLMENT & ON-THE-JOB TRAINING (OJT) GOALS**

Monthly Participant Plan Summary	Annual Plan	Monthly Plan	Monthly Actual	Monthly %
1. Total number of new enrollments	34	20	10	50%
2. Total number of On-the-Job Training (OJT) contracts	34	20	8	40%
3. Total number of WorkKeys assessments completed				
▪ Applied Mathematics				
▪ Reading for Information				
▪ Locating Information				

**INDUSTRY CLUSTERS – OJT PLACEMENTS**

Monthly Placements	Actual	%
1. Total number and percentage of OJT placements targeted to the five (5) industry clusters	8	40%
▪ Agriculture:		
▪ Building/Design (Green jobs): <i>Maintenance, appliance repair</i>	4	50%
▪ Healthcare:		
▪ Education:		
▪ Hospitality/Tourism: cook	1	12%
▪ Other: <i>Office Manager, Receptionist, Sales</i>	3	38%

**GEOGRAPHIC AREAS SERVED**

Quarter ending <u>12/31/09</u>	Plan	Actual
Central (Salinas)	43%	100%
North	9%	0
South	14%	0
West	34%	0

**TARGET POPULATIONS SERVED**

Quarter ending <u>12/31/09</u>	Plan	Actual
Veterans	10%	0
Older Workers	5%	0
Receiving Temporary Assistance for Needy Families (TANF)	12%	5%
High School Dropout	20%	15%
Disabled	16%	5%
Limited English	10%	0
Ex Offender	20%	30%
Homeless	5%	5%

**PERFORMANCE GOALS**

Quarter ending <u>12/31/09</u>	Plan	Actual
1. Total number of exits	16	7
2. Entered Employment Rate – <i>entry into unsubsidized employment</i>	75.5%	43%
3. Retention Rate – <i>6 months after entry into unsubsidized employment</i>	76.5%	40%
4. Average Earnings – <i>increased earnings in unsubsidized employment</i>	\$10,500	
5. Average hourly wage		\$10.13

**UPCOMING ACTIVITIES**

Arbor continues presentations to Sun Street Centers, Pac Meetings, etc. Will be attending Disability Awareness Conference on January 21, 2010.

**TESTIMONIAL**

Ex-offender Samuel: “ I feel great when customers compliment me on a job well done. It motivates me to continue improving my job performance.”



# **INFORMATION #11**



# Monterey County Workforce Investment Board

## Workforce Investment Act (WIA) Title I – Adult Subcontract Monthly Report

### On-the-Job Training (OJT)

**Subcontractor / Program:** Turning Point of Central California, Inc.

**For the period ending:** December 31, 2009

#### ENROLLMENT & ON-THE-JOB TRAINING (OJT) GOALS

Monthly Participant Plan Summary	Annual Plan	Monthly Plan	Monthly Actual	Monthly %
1. Total number of new enrollments	54	36	20	56%
2. Total number of On-the-Job Training (OJT) contracts	54	36	20	56%
3. Total number of WorkKeys assessments completed			0	
▪ Applied Mathematics			0	
▪ Reading for Information			0	
▪ Locating Information			0	

#### INDUSTRY CLUSTERS – OJT PLACEMENTS

Monthly Placements	Actual	%
1. Total number and percentage of OJT placements targeted to the five (5) industry clusters	9	45%
▪ Agriculture:	1	
▪ Building/Design (Green jobs): <i>Painter, Roofer, Restoration,</i>	6	
▪ Healthcare:		
▪ Education:		
▪ Hospitality/Tourism: <i>Shuttle Driver, Cook</i>	2	
▪ Other: <i>Financial Manager, Office Manager, Transportation, Cashier, Automotive, Sales, Pest Control,</i>	11	

#### GEOGRAPHIC AREAS SERVED

*Marketing, Stocker*

Quarter ending __	Plan	Actual
Central (Salinas)	43%	65%
North	9%	
South	14%	5%
West	34%	30%

#### TARGET POPULATIONS SERVED

Quarter ending __	Plan	Actual
Veterans	10%	5%
Older Workers	5%	5%
Receiving Temporary Assistance for Needy Families (TANF)	12%	N/A
High School Dropout	20%	40%
Disabled	16%	65%
Limited English	10%	
Ex Offender	20%	100%
Homeless	5%	35%

#### PERFORMANCE GOALS

Quarter ending __	Plan	Actual
1. Total number of exits	9	12
2. Entered Employment Rate – <i>entry into unsubsidized employment</i>	9	8
3. Retention Rate – <i>6 months after entry into unsubsidized employment</i>		
4. Average Earnings – <i>increased earnings in unsubsidized employment</i>		
5. Average hourly wage –		\$10.25

#### UPCOMING ACTIVITIES

Countywide client recruitment continues with a focus on meeting contract geographic and demographic goals. Comprehensive North County and Limited English recruitment has proved successful relative to program applicants but not enrollments. The challenge appears to be keeping this population engaged in services which is currently being assessed for corrective action. Employer recruitment remains a priority activity with Chamber of Commerce and Rotary Club activity attendance providing new avenues for training site development. December was a busy month with client holiday needs but community partnerships assured that all were met. Staff is scheduled for three Larry Robbins trainings in January, February and March. The instruction topic's are: Rest of the Iceberg; Ex-offender and the Employer Connection; Keep Working and Don't Live Your Life Behind Bars.

#### TESTIMONIAL

- Marvin White is rapidly becoming a success story. He applied for Agency services in October of 2009 just weeks after being released from prison. Marvin is a middle-aged man whose criminal history started as a juvenile. His convictions are all drug related, however escalated in severity as his addiction worsened. Marvin's assessment revealed: minimal work history, but an aptitude for sales and customer services; homeless; no CDL; lack of family or community support; need of a relapse prevention program. Marvin stated a commitment to changing behaviors and demonstrated his sincerity to this goal by his concerted effort to reaching all agreed upon objectives. He successfully completed all pre-employment skills training workshops and worked daily with his Caseworker on his personal goals and with the Employment Specialist in employment. He



**Monterey County Workforce Investment Board**  
**Workforce Investment Act (WIA) Title I – Adult Subcontract Monthly Report**  
*On-the-Job Training (OJT)*

immediately found an AA sponsor and adopted the 12-Steps recovery program as part of his life. He made amends to his victims and was placed in an OJT as a Sales Associate where he has been hired into unsubsidized employment. Marvin has secured permanent housing and is working with Monterey County Family Support as a first step in being reunited with his children and regaining his CDL.

**WAY TO GO MARVIN!**