



MONTEREY COUNTY ECONOMIC DEVELOPMENT

MONTEREY COUNTY WORKFORCE INVESTMENT BOARD

ERIK CUSHMAN, WIB CHAIR

Monterey County Workforce Investment Board (WIB) OVERSIGHT COMMITTEE

Shoreline Workforce Development
249 10th Street, Marina, CA

Thursday, November 14, 2013

8:30-10:00am

Teleconference: 3032 South Araby Road, Yuma, Arizona 85365

**Oversight Committee
Members:**

Mary Ann Leffel, Chair

Al Davis

Jay Donato

Cesar Lara

Larry Silva

Teresa Sullivan

Brian Turlington

Andrea Zeller-Nield

AGENDA

CALL TO ORDER/INTRODUCTIONS:	Mary Ann Leffel, Chair
CHANGES TO AGENDA:	
PUBLIC COMMENT:	
CONSENT CALENDAR:	Mary Ann Leffel
1. Action: Approve the minutes of the September 12, 2013 Oversight Committee meeting.	
DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS:	
1. Receive a report on the WIA 25% Dislocated Worker Additional Assistance special project grant for PY 2012-13.	Joyce Aldrich
2. Receive a report on the status of WIA Adult and Dislocated Worker programs and enrollments for PY 2013-14.	Marleen Esquerra Terri Gallardo
3. Receive a report on the number of local WIA training placements and expenditures for 2012-13 and 2013-14.	Marleen Esquerra
4. Receive a report on the final PY 2012-13 WIA Performance outcomes for Monterey County.	Marleen Esquerra
5. Update on the Local Workforce Investment Area budget for PY 2013-14.	Kristen Aldrich
6. Update on the WIB's Strategic Local Plan goals specific to Adult Programs and System Alignment and Accountability.	Joyce Aldrich
7. Discussion regarding a new Request for Proposal for WIA Title I Adult Programs subcontracts to begin in PY 2014-15.	Joyce Aldrich
8. Action: Approve the monitoring schedule for PY 2013-14.	Marleen Esquerra
ANNOUNCEMENTS OF EVENTS:	
SUBCOMMITTEE MEETINGS: Executive: 11/20/2013 – Shoreline, Marina Oversight: 1/9/2014 – Job Center, (One-Stop), Salinas Youth: 1/14/2014 – Shoreline, Marina Business Services: 12/10/2013 – Marina Library	WIB MEETINGS: 12/4/2013: Marina Library
ADJOURN:	Mary Ann Leffel
To request information, please contact the Monterey County Workforce Investment Board staff at (831) 796-6434 or visit our website at www.montereycountywib.org .	

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

Joyce Aldrich,
Executive Director

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UNADOPTED

Monterey County Workforce Investment Board
Oversight Committee
Thursday, September 12, 2013; 8:30 am
Shoreline Workforce Development, 249 10th Street, Marina, CA

Members Present: Al Davis, Jay Donato, Cesar Lara, Larry Silva, Teresa Sullivan and Brian Turlington

Members Absent: Mary Ann Leffel and Andrea Zeller-Nield

Staff Present: Joyce Aldrich, Marleen Esquerra and Flor Galvan

Others Present: Rosie Chavez, Wil Moore, Deborah Carrillo, Terri Gallardo and Eileen Rohlfing

Call to Order/Introductions: Ms. Sullivan called the meeting to order at 8:30 am and asked for introductions. A quorum was established.

Changes to Agenda: Business Action Items# 4, 7 and 8 will be moved to the top of the agenda.

Public Comment: None

Consent Calendar:

1. **Action:** Approve the July 11, 2013 Oversight committee minutes.

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

Second: Mr. Silva

Motion Passed Unanimously

Discussion or Review of Business Calendar Action Items:

4. **Action: Consider and approve the WIB's Workforce Investment Act (WIA) Fiscal and Procurement Final Monitoring Report from the State Compliance Review Division for Program Year 2012-13.** Ms. Aldrich reported the State conducted its annual compliance review of Monterey County's fiscal management and procurement processes on April 22-26, 2013. The State issued a final monitoring report indicating that Monterey County is meeting all applicable WIA requirements.

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

Second: Mr. Turlington

Motion Passed Unanimously

7. **Action: Consider and approve the WIA Adult subcontract extensions with Shoreline Workforce Development Services and Turning Point of Central California for PY 2013-14, from October 1, 2013 to June 30, 2014.** Ms. Aldrich reported under the existing RFP, this will be the last year the WIA Adult subcontracts can be extended. In Program Year 2012-13, the WIB originally allocated \$567,000 for the WIA subcontracts to provide services to 132 eligible adults throughout Monterey County. For Program Year 2013-14, the State announced a reduction in WIA Adult funds, thus causing Monterey County to reduce its allocation set aside for subcontracts. Also, due to the sequestration, there will be a delay in the start of the subcontracts by 3 months, causing the subcontracts to start in the 2nd quarter on October 1, 2013. Ms. Aldrich explained the proposed funding recommendations for the members to consider.

Motion: Mr. Turlington motioned to accept funding consideration #1, to extend the Adult subcontracts starting on October 1, 2013 for Program Year 2013-14 at a reduced amount.

Second: Mr. Davis

Approved: Davis, Donato, Lara, Sullivan, Turlington

Abstention: Mr. Silva

8. **Action: Consider and approve the schedule and occurrence of future meetings.** Ms. Aldrich stated in response to the Oversight Committee members request, the recommendation is to change the occurrence of Oversight Committee meetings from monthly to bi-monthly.

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

Second: Mr. Silva

Motion Passed Unanimously

Consent Item #1

1. **Welcome new WIB members to the Oversight Committee.** Ms. Sullivan welcomed Mr. Donato and asked that he provide a little background about himself to the committee.
2. **Receive a report on the WIA 25% Dislocated Worker Additional Assistance special project grant for PY 2012-13.** Ms. Aldrich reported the Dislocated Worker Additional Assistance (DWAA) grant was primarily setup to assist displaced Capital One associates. To date, 262 individuals were enrolled over the planned goal of 185. As of August 30, 2013, 91% of grant has been expended and she anticipates that the grant will be fully expended by the end of September 2013. She reported that participants enrolled by OET have been co-enrolled into the Dislocated Worker program so they can continue to be served once the DWAA grant is completely expended.
3. **Report on monitoring of Monterey County's Local Workforce Investment System for PY 2012-13.** Ms. Aldrich reported that the local monitoring with Shoreline and Turning Point has been completed with no findings. She also reported that the monitoring of OET's Adult, Dislocated Worker, Youth and Rapid Response Programs is pending. She reported that the monitoring for the Dislocated Worker Additional Assistance grant will commence in October or November.
5. **Receive a report on WIA Adult and Dislocated Worker programs and activities for PY 2012-13.** Ms. Esquerra reported that there are no new enrollment updates since the last meeting. To date, Monterey County expended 94% of its WIA Adult allocation and 78% of its Dislocated Worker allocation. As for performance, Monterey County exceeded the 80% benchmark set by the Department of Labor each year that measures the number of participants that entered and retained unsubsidized employment, and received an average wage higher than the local area benchmark goal.
6. **Update on the Local Workforce Investment Area budget PY 2013-14.** Ms. Aldrich reported on the PY 2013-14 budget and expenditures. The budget includes carry-in monies from the previous allocation. A significant amount was expended in the Dislocated Worker Program.

Announcement of Events: Mr. Moore reported that on October 22 Shoreline will be hosting a job fair at the Shoreline Career Center in Salinas from 9am-noon.

Adjournment: Ms. Sullivan adjourned the meeting 9:57 a.m.

Motion: Mr. Silva motioned to adjourn the meeting.

Second: Mr. Donato

Motion Passed Unanimously

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

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

DATE: NOVEMBER 14, 2013

INFORMATION:

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

As of November 5, 2013, \$927,213 (93%) of the total grant project amount of \$999,847 has been expended. The grant end date is January 31, 2014.

Since the last Oversight Committee meeting held on September 12, 2013, the total number of enrollments have remained at 262 (142%) of 185. The number of planned vs. actual training enrollments increased by one, for a total of 135 (169%) of 80.

The number of participants who have exited has increased and the number of job placements has increased, as indicated below:

DWAA Services	Plan	Actual	Target Goal	OET		Shoreline	
				Plan	Actual	Plan	Actual
Core & Intensive Registered Enrollments	185	262 (142%)	185 (100%)	105	185	80	77
Training Enrollments	80	135 (169%)	80 (100%)	45	94	35	41
Exits from the Program	185	73 (39%)	185 (100%)	105	64	80	9
Placed in Unsubsidized Employment	125	46 (37%)	79 (63.4% of 125)	70	30	55	16
Employment Retention Goal	80%	TBD					
Avg. Earnings Replacement	\$12,500 over 6 months or \$12.02 per hour			Avg Hrly Rate = \$41.88		Avg Hrly Rate = \$26.97	

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: RECEIVE A REPORT ON THE STATUS OF WIA ADULT AND DISLOCATED WORKER PROGRAMS FOR PY 2013-14

DATE: NOVEMBER 14, 2013

INFORMATION:

This report provides a fiscal and performance status update for Program Year 2013-14 for all WIA Adult and Dislocated Worker program providers to include the Office for Employment Training (OET), Shoreline Workforce Development Services and Turning Point of Central CA.

Expenditures:

As of October 31st, PY 2013-14, Monterey County expended 8% of its WIA Adult funds and 25% of its Dislocated Worker funds, as follows:

WIA Budget	Adult	Dislocated Worker
Carry-In funds from PY 2012-13	\$91,174	\$68,241
PY 2013-14 Allocation	\$1,479,571	\$2,014,142
Total Budget	\$1,570,745	\$2,082,383
YTD Expenditures	\$128,731	\$524,214
Balance	\$1,442,014	\$1,558,169
Percent Expended	8%	25%

**Expenditures do not reflect adult subcontracts since they are pending approval from the Board of Supervisors.*

Enrollments:

As of October 31st, PY 2013-14, Monterey County enrolled/carried-in 12% of its planned Adult participants and 49% of its planned Dislocated Worker participants, as follows:

Cumulative Enrollments for all Providers	Local Plan 2013-14 (includes carry-in)	Actual	% Local Plan
Adult	569	67 (20 new)	12%
Dislocated Worker (OET only)	515	250 (27 new)	49%

**Enrollments do not reflect adult subcontracts since they are pending approval from the Board of Supervisors.*

The performance of WIA Adult & Dislocated Worker Programs is measured by three Common Measures. Monterey County must achieve a local success rate of 80% or higher for each measure. The purpose of these measures is to identify the following core areas of the workforce system:

1. Entered Employment Rate – measures the number of people who got a job
2. Retention Rate – measures those that got a job, whether or not they stayed employed
3. Average Earnings – measures those that stayed employed, what they earned

Performance:

As of the 1st Quarter of Program Year 2013-14, Monterey County exceeded the 80% local success rates as shown below:

Adult	Target Performance Level	Actual Performance Level	Local Success Level	Met 100% Goal?	Met 80% Target?
Entered Employment	67.0%	63%	94%	No	Yes
Retention Rate	75.0%	78%	104%	Yes	Yes
Average Earnings	\$10,500	\$9,399	90%	No	Yes
Dislocated Worker	Target Performance Level	Actual Performance Level	Local Success Level	Met 100% Goal?	Met 80% Target?
Entered Employment	63.4%	65%	103%	Yes	Yes
Retention Rate	80.0%	78%	97%	No	Yes
Average Earnings	\$12,500	\$11,186	89%	No	Yes

Program Provider Reports:

- Office for Employment Training – A summary of OET’s Adult and Dislocated Worker Program performance is attached. A representative from OET plans to present on OET’s Programs at the Oversight Committee meeting.
- Shoreline Workforce Development Services – As of October 1st, there is no enrollment or performance information to report to the Oversight Committee on behalf of Shoreline, due to the late start of its subcontract and the delay in services due to the government shutdown. Shoreline’s Adult subcontract is pending approval from the Board of Supervisors at their meeting scheduled in December 2013.
- Turning Point of Central California – As of October 1st, there is no enrollment or performance information to report to the Oversight Committee on behalf of Turning Point, due to the late start of its subcontract and the delay in services due to the government shutdown. Turning Point’s Adult subcontract is pending approval from the Board of Supervisors at their meeting scheduled in December 2013.



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

Provider: Office for Employment Training

For the period ending: October 2013 – Program Year 2013-14

ENROLLMENT GOALS

Monthly Participant Plan Summary	TARGET GOAL	YTD Actual	% of Goal
1. Total # of CARRY-IN enrollments	236	41	17%
2. Total # of NEW enrollments	233	20	9%
3. Total # of ALL enrollments	469	61	13%
4. Total # of WorkKeys Readiness Indicator			

PROGRAM SERVICES

Participant Plan Summary	Target Goal	YTD Actual	% of Goal
1. Total # of On-the-Job Training or Individual Training Accounts (OJT/ITA)	58	11	19%
2. Total # of WorkKeys assessments completed (includes Adult & DW)	58	11	19%

INDUSTRY CLUSTERS – PLACEMENTS

Placements	YTD Actual	% of Goal
Total # and percentage of OJT/ITA placements, based on the following industry clusters	11	100%
Agriculture	3	27%
Building/Design: construction	0	0%
Healthcare	3	27%
Education	0	0%
Hospitality/Tourism: Driver, Host	1	9%
Creative/Technology	2	18%
Other (<i>Finance, Retail, Sales, etc.</i>)	3	27%

GEOGRAPHIC AREAS SERVED

Period ending <u>October 2013</u>	TARGET GOAL	MINIMUM GOAL	Actual All	% of Actual
Central (Salinas)	55%	10%	30	49%
North	11%	10%	6	10%
South	18%	10%	19	31%
West	16%	10%	5	8%
Outside of Monterey County			1	2%

TARGET POPULATIONS SERVED

Period ending <u>October 2013</u>	TARGET GOAL	Actual	% of All Enrollments
Homeless	5%	1	2%
Offenders	20%	4	7%
Disabilities	16%	1	2%
TANF	12%	2	3%
Veterans	10%	0	0%
Older Workers (55 and older)	5%	5	8%
High School Dropout	20%	11	18%
Limited English	10%	2	3%
Low Income		34	56%

PERFORMANCE GOALS

Quarter ending <u>March 2013</u>	Plan	Actual	Success Level	Target Goal Met? (Min 80%)
1. Total number of exits				
2. Entered Employment Rate – <i>entry into unsubsidized employment</i>	67%	55%	81%	Yes
3. Retention Rate – <i>6 months after entry into unsubsidized employment</i>	75%	79%	105%	Yes
4. Average Earnings – <i>increased earnings in unsubsidized employment</i>	\$10,550	\$9,416	90%	Yes

TRAINING PLACEMENTS BY OCCUPATIONAL TITLE



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

Provider: Office for Employment Training

For the period ending: October 2013 – Program Year 2013-14

ENROLLMENT GOALS

Monthly Participant Plan Summary	TARGET GOAL	YTD Actual	% of Goal
1. Total # of CARRY-IN enrollments	215	219	102%
2. Total # of NEW enrollments	300	27	9%
3. Total # of ALL enrollments	515	246	48%
4. Total # of WorkKeys Readiness Indicator			

PROGRAM SERVICES

Participant Plan Summary	Target Goal	YTD Actual	% of Goal
1. Total # of On-the-Job Training or Individual Training Accounts (OJT/ITA)	15	124	827%
2. Total # of WorkKeys assessments completed (includes Adult & DW)	15	124	827%

INDUSTRY CLUSTERS – PLACEMENTS

Placements	YTD Actual	% of Goal
Total # and percentage of OJT/ITA placements, based on the following industry clusters	-	-
Agriculture	17	14%
Building/Design: construction	2	2%
Healthcare	18	15%
Education	0	0%
Hospitality/Tourism: Driver, Host	1	1%
Creative/Technology	12	10%
Other (<i>Finance, Retail, Sales, etc.</i>)	74	60%

GEOGRAPHIC AREAS SERVED

Period ending <u>October 2013</u>	TARGET GOAL	MINIMUM GOAL	Actual All	% of Actual
Central (Salinas)	55%	10%	146	59%
North	11%	10%	15	6%
South	18%	10%	20	8%
West	16%	10%	57	24%
Outside of Monterey County			8	3%

TARGET POPULATIONS SERVED

Period ending <u>October 2013</u>	TARGET GOAL	Actual	% of All Enrollments
Homeless	5%	2	1%
Offenders	20%	5	2%
Disabilities	16%	4	2%
TANF	12%	0	0%
Veterans	10%	14	6%
Older Workers (55 and older)	5%	43	17%
High School Dropout	20%	10	4%
Limited English	10%	1	0%
Low Income		10	4%

PERFORMANCE GOALS

Quarter ending <u>As of November 13, 2013</u>	Plan	Actual	Success Level	Target Goal Met? (Min 80%)
1. Total number of exits				
2. Entered Employment Rate – <i>entry into unsubsidized employment</i>	63%	65%	103%	Yes
3. Retention Rate – <i>6 months after entry into unsubsidized employment</i>	80%	78%	97%	Yes
4. Average Earnings – <i>increased earnings in unsubsidized employment</i>	\$12,500	\$11,187	90%	Yes

TRAINING PLACEMENTS BY OCCUPATIONAL TITLE

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: RECEIVE A REPORT ON THE NUMBER OF LOCAL WIA TRAINING PLACEMENTS AND EXPENDITURES FOR 2012-13 AND 2013-14

DATE: NOVEMBER 14, 2013

INFORMATION: Effective Program Year (PY) 2012-13, local Workforce Investment Boards are required to spend at least 25 percent of the combined total of their Adult and Dislocated Worker WIA Title I funds on training, imposed by Senate Bill 734. Ten percent (10%) of the expenditure requirement may be met by applying designated leveraged resources.

25% Training Budget:

The following provides a breakdown of Monterey County's total training expenditure requirement and leveraged resources for Program Years 2012-13 and 2013-14:

25% Training Budget	PY 2012-13 Amount	PY 2013-14 Amount
Adult	\$252,737	\$392,686
Dislocated Worker	\$292,566	\$414,829
Total Combined Training Budget	\$545,303	\$807,515
Leveraged Amount (up to 10%)	\$363,535	\$105,767
Total Combined Training Budget & Leveraged \$	\$908,838	\$913,282

Training Funds Obligated:

The following provides a breakdown of Monterey County's training obligations and leveraged resources for Program Years 2012-13 and 2013-14:

Total Training Funds OBLIGATED	PY 2012-13 Amount	PY 2013-14 Amount
Adult Training Obligated	\$191,043	\$22,941
Dislocated Worker Training Obligated	\$368,540	\$265,636
Leveraged Amount (up to 10%)	\$363,535	\$17,789
YTD Training Obligated & Leveraged \$ as of 10/31/2013	\$923,118	\$306,366
Percent Obligated & Leveraged	102%	34%

Actual Training Funds Expended:

The following provides a breakdown of Monterey County's actual training expenditures and leveraged resources for Program Years 2012-13 and 2013-14:

Total Training Funds EXPENDED	PY 2012-13 Amount	PY 2013-14 Amount
Adult Training Expenditures	\$179,206	\$6,836
Dislocated Worker Training Expenditures	\$295,745	\$38,371
Leveraged Amount (up to 10%)	\$269,854	\$5,965
YTD Training Expenditures & Leveraged \$ as of 10/31/2013	\$744,805	\$51,172
Percent Expended & Leveraged	82%	6%

Program Year (PY) 2012-13 - Training Enrollments:

Since the last Oversight Committee meeting on September 10, 2013, the number of Adult and Dislocated Worker training enrollments have increased from 182 to 187.

The majority of enrollments (104 or 56%) were referred to training vendors on the Eligible Training Provider List (ETPL) to receive tuition reimbursement through the use of individual training accounts (ITA). While the remaining enrollments (83 or 44%) participated in the local labor force through the utilization of on-the-job training (OJT) opportunities, which means they received training by an employer while engaged in productive work on the job.

For Program Year 2012-13, a total of 134 have been enrolled into individual training accounts under the Dislocated Worker Additional Assistance special project grant for a total training obligation of \$528,669.

The following is a breakdown of training enrollments and obligated expenditures for PY 2012-13:

2012-13 - Adult and Dislocated Worker (DW) - Training Contracts						
Grants	Agency	Training	#Enrolled	Obligated	Est. Avg Cost	OJT Leveraged \$
ADULT	OET	ITA	23	\$ 88,962.29	\$ 3,867.93	\$ -
ADULT	OET	OJT	1	\$ 4,765.50	\$ 4,765.50	\$ 2,382.75
ADULT	Shoreline	ITA	1	\$ 1,700.00	\$ 1,700.00	\$ -
ADULT	Shoreline	OJT	35	\$ 46,846.76	\$ 1,338.48	\$ 23,423.38
ADULT	Turning Point	OJT	40	\$ 48,769.02	\$ 1,219.23	\$ 24,384.51
DW	OET	ITA	80	\$ 337,063.02	\$ 4,213.29	\$ -
DW	OET	OJT	7	\$ 31,477.75	\$ 4,496.82	\$ 15,738.88
SUBTOTAL			187	\$ 559,584.34		\$ 65,929.52
2012-13 - All Other Training						
Grants	Agency	Training	# Enrolled	Obligated	Est. Avg Cost	DWAA Leveraged \$
WORKFORCE SOL	OET	OJT	22	\$ 35,575.54	\$ 1,617.07	\$ -
DWAA	OET	ITA	93	\$ 353,270.72	\$ 3,798.61	\$ 353,270.72
DWAA	Shoreline	ITA	41	\$ 175,399.00	\$ 4,278.02	\$ -
AB109	OET	ITA	2	\$ 9,912.00	\$ 4,956.00	\$ -
AB109	OET	OTJ	1	\$ 1,920.00	\$ 1,920.00	\$ -
SUBTOTAL			159	\$ 576,077.26		\$ 353,270.72
TOTAL			346	\$ 1,135,661.60		\$ 419,200.24

Program Year (PY) 2013-14 - Training Enrollments:

For PY 2013-14, the total number of Adult and Dislocated Worker training enrollments is 64.

The majority of enrollments (60 or 94%) were referred to training vendors on the Eligible Training Provider List (ETPL) to receive tuition reimbursement through the use of individual training accounts (ITA). While the remaining enrollments (4 or 6%) participated in the local labor force through the utilization of on-the-job training (OJT) opportunities, which means they received training by an employer while engaged in productive work on the job.

For PY 2013-14, one new participant was enrolled into an ITA under the Dislocated Worker Additional Assistance special project grant for a total training obligation of \$5,000. For this grant, this brings the total number of enrollments to 135, for a total training obligation of \$533,669.

BUSINESS ITEM #3

The following is a breakdown of training enrollments and obligated expenditures for PY 2013-14:

2013-14 - Adult and Dislocated Worker (DW) - Training Contracts						
Grants	Agency	Training	# Enrolled	Obligated	Est. Avg Cost	OJT Leveraged \$
ADULT	OET	ITA	2	\$ 9,761.02	\$ 4,880.51	\$ -
ADULT	OET	OJT	2	\$ 13,180.50	\$ 6,590.25	\$ 6,590.25
DW	OET	ITA	58	\$ 253,238.30	\$ 4,366.18	\$ -
DW	OET	OJT	2	\$ 12,398.40	\$ 6,199.20	\$ 6,199.20
SUBTOTAL			64	\$ 288,578.22		\$ 12,789.45
2013-14 - All Other Training						
Grants	Agency	Training	# Enrolled	Obligated	Est. Avg Cost	DWAA Leveraged \$
WORKFORCE SOL	OET	OJT	7	\$ 19,942.00	\$ 2,848.86	\$ -
DWAA	OET	ITA	1	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
AB109	OET	ITA	4	\$ 20,468.00	\$ 5,117.00	\$ -
AB109	OET	OTJ	3	\$ 7,800.00	\$ 2,600.00	\$ -
YOUTH	OET	ITA	2	\$ 12,500.00	\$ 6,250.00	\$ -
SUBTOTAL			17	\$ 65,710.00		\$ 5,000.00
TOTAL			81	\$ 354,288.22		\$ 17,789.45

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

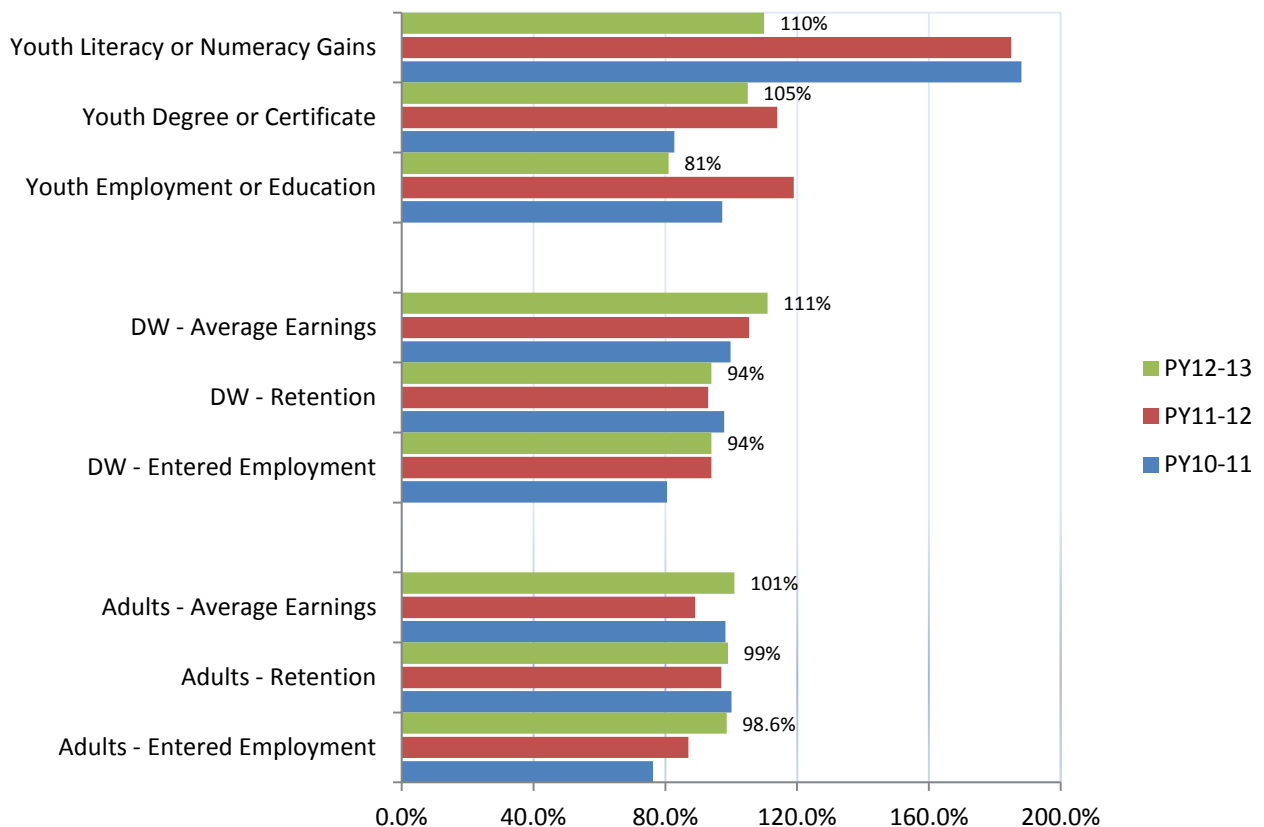
SUBJECT: REVIEW THE STATE'S FINAL LOCAL AREA PERFORMANCE OUTCOMES FOR MONTEREY COUNTY FOR PARTICIPANTS SERVED IN PY 2012-13

DATE: NOVEMBER 14, 2013

INFORMATION: The Department of Labor (DOL) sets standard performance measures known as "Common Measures" each year for Local Workforce Investment Areas (LWIA) to use to oversee the workforce investment system effectively and to evaluate the performance of their service providers. The performance is calculated at the end of each program year based on the number of participants enrolled and their date of exit from a Workforce Investment Act funded program. Each designated LWIA must achieve a success rate of 80% or higher on at least eight of the nine Common Measures.

DISCUSSION: Reports submitted by the State for program year 2012-13, indicate that Monterey County's LWIA surpassed the 80% success rate threshold on all nine goals and exceeded 100% above goal on four of the performance measures as indicated in the chart below. The chart also includes the success rates achieved over the past 3 years (2010-2013).

Performance by Program Years 2010 – 2013



ATTACHMENT: State Notice – Final PY 2012-13 WIA Performance Results

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD
FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD
SUBJECT: UPDATE ON THE LOCAL WORKFORCE INVESTMENT AREA BUDGET FOR PY 2013-14
DATE: NOVEMBER 14, 2013

INFORMATION:

At the Oversight Committee meeting on November 14, 2013, WIB staff plan to present an update on the Local Workforce Investment Area's (LWIA) Program Year budget for 2013-14.

ATTACHMENT:

Reference budget handout at meeting.

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD OVERSIGHT COMMITTEE

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: UPDATE ON THE WIB'S STRATEGIC LOCAL PLAN GOALS SPECIFIC TO ADULT PROGRAMS AND SYSTEM ALIGNMENT AND ACCOUNTABILITY

DATE: NOVEMBER 14, 2013

SUMMARY:

The following includes a "blue print" of the WIB's Key Strategic Local Plan goals specific to Adult Programs and System Alignment and Accountability. The goals, strategies and actions emerged from various stakeholder meetings held to develop the WIB's Local Plan for Program Years 2013-17. This document is intended to guide the activities of the workforce system in alignment with the State Plan goals over the next five years.

The attached document was reformatted for the Oversight Committee to focus its efforts on the goals specific to Adult Programs and System Alignment and Accountability and the progress made to date.

ATTACHMENT: WIB Key Strategic Goals, Strategies and Actions – Adult Programs and System Alignment and Accountability Goals

ADULT & SYSTEM ALIGNMENT GOALS

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

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).	No	Oct 2013	Report to Executive Committee 8/21 and 9/18.
July 2013	WIB Staff	2. Convene WIA provider meetings to share info on programs, roles, benefits/value, and challenges.	No	Oct 2013	Convene when new contracts are approved for PY 2013-14.
Aug 2013	WIB Staff & AJCC partners	3. Institute national branding of “America’s Job Center”, formerly known as One-Stop Career Center.	Yes	Aug 2013	In progress. Report to Executive Committee 8/21.

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		In progress of updating MOUs to re-evaluate offerings.
Sep/Oct 2013	WIB Staff & AJCC partners	2. Ensure services are available to diverse groups (disabled, vets, older workers, migrant workers, etc.)	In progress		In progress of updating MOUs to re-evaluate offerings.

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.

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			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.				Reference new ETPL guidance to be released from the State.

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		Updates to be presented at Oversight & Executive Committees.
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		Updates to be presented at Business Services Committee regularly.
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		Updates to be presented at Business Services Committee regularly.

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.				Facilitate discussion at Oversight & Youth Council meetings.
Oct 2013	AJCC Partners, Business Services & Rapid Response Team	2. Streamline processes for employers to participate in on-the-job training.				
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.				

Comments / Suggestions:

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD

FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD

SUBJECT: DISCUSSION REGARDING A NEW REQUEST FOR PROPOSAL FOR WIA TITLE I ADULT PROGRAMS SUBCONTRACTS TO BEGIN IN PY 2014-15

DATE: NOVEMBER 14, 2013

INFORMATION:

Program Year (PY) 2013-14 will be the last year the Workforce Investment Act (WIA) Title I Adult subcontracts can be extended. The WIB is required to decide if they wish to develop a new Request for Proposals (RFP) starting PY 2014-15 with a different program design and contract deliverables.

Should it be the desire of the Oversight Committee to create a new RFP with a different program design and contract deliverables, it must be developed by WIB staff and circulated on or about January 2014. Types of subcontracts that can be considered are for economically disadvantaged adults in general or specific target groups. An RFP can be for one specific area of the county or for the entire county. Specialized services such as occupational skills training and/or on-the-job training contracts can be requested.

The primary purpose in developing an RFP for Workforce Investment Act (WIA) Title I Adult Services for program year 2014-15 is to seek qualified organizations that may provide high quality WIA Title I program services to economically disadvantaged and hard-to-serve adults that impact the number of people who secure and retain employment in high wage and high demand jobs. The program encompasses core, intensive and training services for adult participants as described in the Code of Federal Regulations (CFR), Part 663, Subpart A-C, and F-H.

■ **Occupational Skills Training**

Participants who cannot find employment through intensive services may receive short-term training services linked to job opportunities in Monterey County, including occupational training and training in basic skills. To promote customer choice and involvement in career decisions, participants use an Individual Training Account (ITA) to select an appropriate training program from a qualified training provider on the State's Eligible Training Provider List.

■ **On-the-Job Training (OJT) - Program Services**

Proposals may be sought from qualified organizations to prepare eligible Adults for participation in the labor force through utilization of On-the-Job Training contracts. The term "On-the-Job Training" (OJT) means training by an employer that is provided to a paid participant while engaged in productive work in a job that:

- Provides knowledge or skills essential to the full and adequate performance of the job;
- Provides reimbursement to the employer of up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and additional supervision related to training, and;
- Is limited in duration as appropriate to the occupation for which the participant is being trained, taking into consideration the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate.

■ **Supportive Services**

Participants may be provided with supportive services for transportation, childcare and other WIA allowable costs, as necessary, in order to succeed in and complete the program.

BUSINESS ITEM #7

■ **Contract Period**

The proposed contract period would be for one-year with the WIB's option to extend the contract annually, for a maximum of two years, starting July 1, 2014 through June 30, 2015.

■ **Monterey County General Services**

This RFP will be developed in conformance with the requirements outlined in the CFR 664.410. As in the past, Monterey County's Contracting and Purchasing Department will be involved with the structure, format, and process of the RFP and will be involved in key aspects, such as the receipt of bids, evaluation of bids, and general monitoring of the process.

■ **Target Population & Geographic Regions**

Services will be targeted to WIA eligible Monterey County Adults (18 years of age and older) who face multiple barriers to employment, are low income based on the current Lower Living Standard Income Level (LLSIL) guidelines, are registered for selective service (males only), have right to work documentation such as a social security card, passport, and birth certificate, and are included in one or more of the following categories below, based on WIB Policy #2005-04 - WIB Adult and Youth Service Strategy Goals Policy.

TARGET POPULATIONS	Min % of Adults to Serve
Disabled Individuals	16%
High School Dropouts	20%
Homeless	5%
Limited English	10%
Offenders	20%
Older Workers	5%
TANF recipients	12%
Veterans and their eligible spouses*	10%

**Veterans and eligible spouses must receive priority of service over all other program participants. Veterans or eligible spouses must first meet any and all of the statutory eligibility criteria in order to be considered eligible for enrollment into a program and or receive services.*

In addition, providers should design their program to meet the minimum 10% and target service level goals that are specific to the four (4) geographic regions of Monterey County in serving WIA eligible and economically disadvantaged adults, based on WIB Policy #2010-01 - Monterey County WIA Geographic Service Goals.

Areas contained within the designated geographic areas are as follows:

- North: Aromas, Castroville, Elkhorn, Las Lomas, Moss Landing, Pajaro and Prunedale;
- Central: Boronda, Salinas, Speckles and Chualar;
- Peninsula (West): Carmel, Carmel Valley, Del Monte Forest; Del Rey Oaks, Marina, Monterey, Pacific Grove; Sand City and Seaside; and
- South: Bradley, Gonzales, Greenfield, King City, San Ardo, San Lucas and Soledad.

FISCAL, PROGRAM, AND MANAGEMENT INFORMATION (MIS) ISSUES OR IMPACTS:

This RFP will be funded by WIA Title I Adult funds for a proposed allocation to be determined. Funding levels for requested programs are contingent upon WIA Title I Adult allocations received from the US Department of Labor (US DOL) and the State of California for program year 2014-15.

MEMORANDUM

TO: OVERSIGHT COMMITTEE, WORKFORCE INVESTMENT BOARD
FROM: JOYCE ALDRICH, EXECUTIVE DIRECTOR, WORKFORCE INVESTMENT BOARD
SUBJECT: APPROVE THE MONITORING SCHEDULE FOR PROGRAM YEAR 2013-14
DATE: NOVEMBER 14, 2013

RECOMMENDATION:

It is recommended that the Oversight Committee consider and approve the following monitoring schedule for program year 2013-14 for WIA Title I Adult, Youth, Dislocated Worker, and Rapid Response programs and service providers as well as any Special Projects and Discretionary Grants.

Proposed Adult, Dislocated Worker, Rapid Response & Special Projects Monitoring Schedules and Reporting Periods:

Shoreline Adult Program:

- February 5-6, 2014
- Report: March 2014

Turning Point Adult Program:

- February 19-21, 2014
- Report: March 2014

Office for Employment Training Adult, Dislocated Worker & Rapid Response Programs:

- April 7-11, 2014
- Reports: May 2014

Special Project and Discretionary Grants:

- To be determined based on grant start and end periods

Proposed Youth & Special Projects Monitoring Schedules and Reporting Periods:

Turning Point Youth Program:

- February 19-21, 2014
- Report: March 2014

Santa Cruz County Office of Education Youth Program:

- February 25-26, 2014
- Report: March 2014

Office for Employment Training Youth Programs

- April 16-17, 2014
- Reports: May 2014