



# PUBLIC MEETING NOTICE

## Monterey County Workforce Investment Board Meeting

Monterey Peninsula College, Sam Karas Room, 980 Fremont Street, Monterey, CA 93940

Wednesday, December 7, 2011 - 7:30 am

Erik Cushman,  
WIB & Executive Chair

Joanne Webster,  
WIB 1<sup>st</sup> Vice Chair

Anthony Aniello  
WIB 2<sup>nd</sup> Vice Chair

David Bernahl, II,  
WIB Past Chair

### WIB Members:

Wendy Brickman  
Diana Carrillo  
Maria Castillo  
Al Davis  
Rick Deraiche  
David Dwyer  
Douglas Garrison  
Scott Grover  
Hunter Harvath  
Neal Heckman  
Phoebe Helm  
Cesar Lara  
Mary Ann Leffel  
Maggie Melone-Echiburu  
Salvador Munoz  
Dave Potter  
Steve MacArthur  
Judith Profeta  
Elliott Robinson  
Ralph Rubio  
Ken Scherpinski  
Larry Silva  
Teresa Sullivan  
Brian Turlington  
Mark Verbonich  
Robert Weakley  
Andrea Zeller-Nield

Monterey County  
Workforce Investment  
Board (WIB)

Loyanne Flinn,  
Acting Executive Director  
168 W. Alisal St., 2<sup>nd</sup> Floor  
Salinas, CA 93901  
(831) 759-6644  
flinnlg@co.monterey.ca.us  
www.montereycountywib.org

### AGENDA

7:15am Healing Pole Video

Erik Cushman,  
Chair

### CALL TO ORDER/INTRODUCTIONS

### CHANGES TO THE AGENDA

PUBLIC COMMENT: For items not listed on the agenda. Limited to 3 min.

### 7:30am BUSINESS MEETING

**1. Action:** Approve the minutes of the October 5, 2011 Workforce Investment Board meeting.

Erik Cushman

### APPOINTMENTS & RESIGNATIONS

**2. Action:** Accept the resignation of Maggie Melone-Echiburu, representing Business (Healthcare) from the Monterey County Workforce Investment Board (MCWIB).

Erik Cushman

### BUSINESS MEETING

Chair's Report: Update on appointment of Economic Development/Workforce Investment Board Director.

Erik Cushman

Director's Report: Summary of funding and workforce development issues.

Loyanne Flinn

### OTHER BOARD MATTERS

Board Member Comments and Referrals: The Chair shall receive requests for information from board members for items not appearing on the agenda.

**3. Action:** Approve the monitoring schedule for Program Year (PY) 2011-12 WIA Title I Adult, Dislocated Worker, Rapid Response and Youth Programs and Special Discretionary Grant Projects.

Cesar Lara

**4. Action:** Approve the Final Monitoring Report for the Office for Employment Training's Adult and Dislocated Worker Programs for PY 2010-11.

Cesar Lara

**5. Action:** Approve the Final Monitoring Report for the Office for Employment Training's Rapid Response Program for PY 2009-10 and 2010-11.

Cesar Lara

**6. Action:** Approve the Final Monitoring Report for the California Gang Reduction Intervention and Prevention (CalGRIP) Program for PY 2009-10.

Cesar Lara

**7. Action:** Approve the Final WIB On-The-Job Training Policy.

Erik Cushman

**8. Action:** Review and Approve the WIB Annual Report.

Stephanie Shonley

**9. Information:** Update on the disposition of the Healing Pole.

Diane Carrillo

**10. Information:** Update on the Economic and Workforce Development Planning.

Erik Cushman

### ANNOUNCEMENTS OF EVENTS

Upcoming Subcommittee Meetings:

Executive: 12/21/11; 1/18/12

Oversight: 12/08/11(CANCELLED)

Oversight: 1/12/12

Youth Council: 1/10/12

Upcoming WIB Meetings:

February 1, 2012-TBD

Erik Cushman

### ADJOURN

Erik Cushman

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. For information, please call (831) 796-6434 or visit our website at [www.montereycountywib.org](http://www.montereycountywib.org).



Erik Cushman,  
WIB & Executive Chair

Joanne Webster,  
WIB 1<sup>st</sup> Vice Chair

Anthony Aniello,  
WIB 2<sup>nd</sup> Vice Chair

David Bernahl, II,  
WIB Past Chair



## Monterey County Workforce Investment Board (WIB)

### Contact Information

#### Loyanne Flinn, WIB Acting Director

Salinas One-Stop Career Center  
730 La Guardia Street, Salinas, CA 93905  
Phone: (831) 759-6644  
Email: [flinnlg@co.monterey.ca.us](mailto:flinnlg@co.monterey.ca.us)  
Website: [www.montereycountywib.org](http://www.montereycountywib.org)  
General Phone: (831) 796-3313  
Fax: (831) 796-3512

#### WIB STAFF:

Manley Bush, (831) 796-6414, [bushm@co.monterey.ca.us](mailto:bushm@co.monterey.ca.us)  
Marleen Esquerra, (831) 796-6412 [esquerraml@co.monterey.ca.us](mailto:esquerraml@co.monterey.ca.us)  
Stephanie Shonley, (831) 796-6410, [shonleys@co.monterey.ca.us](mailto:shonleys@co.monterey.ca.us)  
Flo Galvan, (831) 796-6434, [galvanf@co.monterey.ca.us](mailto:galvanf@co.monterey.ca.us)

## Monterey County One-Stop Career Center Operators

### Contact Information



#### Department of Social and Employment Services - Office for Employment Training (OET)

Barbara Verba, Deputy Director  
Phone: (831) 796-3320  
Email: [verba@co.monterey.ca.us](mailto:verba@co.monterey.ca.us)  
Website:  
[www.onestopmonterey.org](http://www.onestopmonterey.org)  
<http://mcdses.co.monterey.ca.us>

#### Department of Social and Employment Services - CalWORKs Employment Services (CWES)

Barbara Verba, Deputy Director  
Phone: (831) 796-3320  
Email: [verbab@co.monterey.ca.us](mailto:verbab@co.monterey.ca.us)  
Website:  
<http://mcdses.co.monterey.ca.us>

#### Employment Development Department (EDD)

Yuko Duckworth, Acting Manager  
Phone: (831) 796-3632  
Email:  
[Yuko.duckworth@edd.ca.gov](mailto:Yuko.duckworth@edd.ca.gov)  
[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

Monterey County  
Workforce Investment  
Board (WIB)

Loyanne Flinn,  
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**UNADOPTED**

**Minutes of the Monterey County Workforce Investment Board  
Wednesday, October 5, 2011 – 8:30am  
Department of Social and Employment Services  
1000 S. Main Street, Room 110, Salinas, CA**

**WIB members were encouraged to attend the Community Alliance for Safety and Peace (CASP) meeting from 7-8:15 am at the Salinas City Elementary School District Offices, 840 South Main Street, Salinas. Mr Cushman shared information about the WIB and workforce development initiatives that align with the efforts of CASP.**

**Members present:** Erik Cushman (Chair), Mary Ann Leffel, Cesar Lara, Scott Grover, Neal Heckman, Mark Verbonich, Andrea Zeller-Nield, Phoebe Helm, Rick Deraiche, David Dwyer, Teresa Sullivan, Steve MacArthur, Ralph Rubio, Wendy Brickman, Diana Carrillo, Maria Castillo, Dr. Douglas Garrison, Salvador Munoz, Brian Turlington, Loyanne Flinn (Acting WIB Executive Director, Ex-Officio Member),

**Members Absent:** Elliott Robinson, Robert Weakley, Al Davis, Hunter Harvath, Maggie Melone-Echiburu, Dave Potter, Judith Profeta, Anthony Aniello, Joanne Webster, Larry Silva, David Bernahl

**Others Present:** Mark Gonzalez (WIB Youth Council), Jayne Mohammadi (Aide to Supervisor Dave Potter), Rosie Chavez (Turning Point), Wil Moore (Shoreline), Rod Powell, Bertha Gonzalez (OET) and Jim Cook (Economic Development Department)

**Staff Present:** Manley Bush, Marleen Esquerra, Flor Galvan, Stephanie Shonley

**CALL TO ORDER/INTRODUCTIONS:** Mr. Cushman called the meeting to order at 8:40am. He welcomed those in attendance and called for introductions. A quorum was established.

**CHANGES TO THE AGENDA:** Prior to the Director's Report, Antonia Herrera from CASP will provide the committee with a brief summary of CASP.

**PUBLIC COMMENT:** Mr. Gonzalez discussed relocation of a Healing Pole that was created by Monterey County youths. He will provide the Executive Committee with a proposal of costs for relocation and cost of maintenance.

**1. Action: Approve the minutes of the August 3, 2011 Workforce Investment Board meeting.**

Mr. Turlington suggested that we amend the minutes to state "recent changes occurred wherein the WIB is now a part of the new Economic Development Department with Housing and Redevelopment and Economic Development."

**Motion:** Ms. Helm motioned to accept the minutes as amended.

**Second:** Mr. Lara

**Motion passed unanimously**

**Actions 2-4**

**Motion:** Mr. Rubio motioned to accept the action as stated.

**Second:** Mr. Munoz

**Motion passed unanimously**

**2. Action: Accept the resignation of Richard Gillis, representing Business (Alternative Energy) from the Monterey County Workforce Investment board (MCWIB) and Planning Committee.**

**3. Action: Accept the resignation of Lupe Palacio, representing Community Base Organizations (CBO) from the MCWIB and Oversight Committee.**

- 4. Action: Approve the reappointment of Elliott Robinson, representing Welfare to Work, Community Service Block Grant Employment & Training programs on the MCWIB for a period of three years or October 2014.**

**Ms. Herrera from Community Alliance for Safety and Peace (CASP)** stated that CASP is a group of Salinas and Monterey County government, education and non-profit leaders who have teamed up to reduce gang violence and improve safety. Their focus is developing a strategic work plan aimed at reducing gang and youth violence and building a "City of Peace." They are currently collaborating with different agencies to obtain grants.

**Director's Report:** Ms. Flinn stated that WIB staff is working to bring in additional funds to support operations. She updated the status of the contract with Workforce 2.0; it has been put on hold for further consideration in January 2012 to allow time for reorganization efforts and outcomes in the Department of Social and Employment Services.

- 5. Action: Approve the amended Monterey County Workforce Investment Board (MCWIB) Bylaws.**

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

**Second:** Ms. Carrillo

**Motion passed unanimously**

- 6. Information: Discussion and update of the Economic Development Opportunity Department Stanford Research Institute (SRI) Report.** Mr. Cook stated that SRI International conducted 90 interviews with stakeholders representing a range of industries and interest groups around the county. The information was then compiled to provide the report listing Monterey County's strengths and weaknesses. A county-wide economic strategic plan will be held to discuss the report further.

- 7. Information: Discuss the President's Jobs Bill:** Ms. Flinn stated that the President announced plans to fund his \$47 billion jobs bill. \$2 billion for subsidized employment, \$1.5 billion for summer and year round youth activities and a \$1.5 billion competitive grant program to assist low income adults and youths.

- 8. Information: Discuss and update of the EDD audit response.** Mr. Cushman stated that the EDD audit found six areas that were problematic. A response was forwarded to EDD September 22, 2011. The process could take another year before a resolution is made. Any money that needs to be repaid will be paid through county funds.

- 9. Information: Discussion and update on California Workforce Association (CWA) Meeting of the Minds Conference in Monterey, September 6-8, 2011.** Ms. Leffel stated the main focus at the Meeting of the Minds was the blending of economic development and workforce.

**ANNOUNCEMENTS:**

Mr. Cushman announced upcoming meetings.

**ADJOURNMENT:**

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

**Second:** Ms. Carrillo

**Motion Passed Unanimously**

**Mr. Cushman adjourned the meeting at 9:52am**

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** ACCEPT THE RESIGNATION OF MS. MAGGIE MELONE-ECHIBURU  
REPRESENTING BUSINESS FROM THE MCWIB UPON APPROVAL.  
**DATE:** DECEMBER 07, 2011

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**RECOMMENDATION:**

It is recommended that the Executive Committee accept the resignation of Ms. Melone-Echiburu, representing Business from the MCWIB effective upon approval.

**INFORMATION:**

WIB staff received an email notification dated October 5, 2011, from Ms Melone-Echiburu regarding her resignation from the MCWIB. On October 31, 2011, WIB staff received a formal letter of resignation.

**ATTACHMENT:**

02a. Letter of resignation from Ms Melone-Echiburu



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Loyanne Flinn, Acting Executive Director  
Monterey County Workforce Investment Board

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

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11/18/2011  
Date

October 31, 2011

Erik Cushman, Board Chair  
Ms. Loyanne Flinn, Acting Executive Director  
Workforce Investment Board  
Monterey County  
168 West Alisal Street, 2nd Floor,  
Salinas, CA 93901


Dear Erik and Loyanne,

I am writing to submit my resignation from the WIB Board. I am no longer working at Clinica de Salud del Valle de Salinas, therefore I no longer represent them as a business.

I would like to thank you and everyone on the WIB staff, and the entire board for the opportunity to serve with them. I am very proud to have served on the board and wish everybody continued success.

Thank you!

Sincerely,



Maggie Melone-Echiburú

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** APPROVE THE MONITORING SCHEDULE FOR PY 2011-12 WIA TITLE I ADULT, DISLOCATED WORKER, RAPID RESPONSE AND YOUTH PROGRAMS AND SPECIAL DISCRETIONARY GRANT PROJECTS  
**DATE:** DECEMBER 07, 2011

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**INFORMATION/DISCUSSION:** It is recommended the Oversight Committee consider and approve the following monitoring schedule for program year 2011-12 for WIA Title I Adult and Youth Subcontractors and OET Adult, Dislocated Worker, Youth, and Rapid Response Programs as well as any Special Project and Discretionary Grants.

The Oversight Committee performs periodic evaluation of Workforce Investment Act (WIA) Title I fiscal and program performance of the One Stop Career Center system, service providers and sub-contractors, as well as special projects and discretionary grants. This committee is responsible for making recommendations to the Monterey County Workforce Investment Board (WIB) on all oversight and performance related matters with the exception of youth programs. The Youth Council is responsible for making recommendations to the full WIB regarding youth programs and proposals for funding, and provides oversight of WIA Title I youth programs.

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

**Shoreline Adult Program:**

- On-Site: February 6-7, 2012 (Salinas)
- Fiscal: February 8, 2012 (San Luis Obispo)
- Report: March 2012

**Turning Point Adult Program:**

- On-Site: February 21-22, 2012 (Salinas)
- Fiscal: February 23, 2012 (Visalia)
- Report: March 2012

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

- On-Site: April 2-3, 2012 (Salinas)
- Fiscal: April 5-6, 2012 (Salinas)
- Reports: May 2012

**Proposed Youth & Special Projects Monitoring Schedules and Reporting Periods:**

**Turning Point Youth Program:**

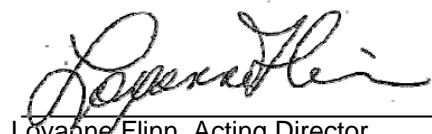
- On-Site: February 21-22, 2012 (Salinas)
- Fiscal: February 23, 2012 (Visalia)
- Report: March 2012

**Santa Cruz County Office of Education Youth Program:**

- On-Site: March 5-7, 2012 (Santa Cruz)
- Fiscal: March 2012 (Santa Cruz)
- Report: March 2012

**Office for Employment Training Youth Programs**

- On-Site: April 9-10, 2012 (Salinas)
- Fiscal: April 11-12, 2012 (Salinas)
- Reports: May 2012



Loyanne Flinn, Acting Director  
 Monterey County Workforce Investment Board  
 This report was prepared by: Marleen Esquerro, Management Analyst

11/18/2011  
 Date

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** APPROVE THE FINAL MONITORING REPORT FOR THE OFFICE FOR  
EMPLOYMENT TRAINING'S ADULT AND DISLOCATED WORKER  
PROGRAMS FOR PY 2010-11  
**DATE:** DECEMBER 07, 2011

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This monitoring review is to report the results of the WIB's staff contract compliance monitoring for the Workforce Investment Act (WIA) Title I activities performed by the Office for Employment Training for the Adult and Dislocated Worker grant activities for Program Year 2010-11. The monitoring review covered both July 1, 2009 – June 30, 2010 and July 1, 2010 – June 30, 2011 time periods. The report focused on the areas of program oversight, staff time distribution and fiscal expenditures.

A program exit interview was conducted on September 22, 2011 with Employment Services Branch Director Barbara Verba, and Program Manager, Rod Powell, with an opportunity to respond to any issues or concerns.

A consolidated draft monitoring report was issued to OET on July 11, 2011. WIB staff received OET's corrective action response on August 16, 2011. OET was issued their final report on August 25, 2011.

Any closed findings and/or observations noted in the report will be reevaluated for improvement in upcoming monitoring reviews.

## **Recommendation**

It is recommended that the Workforce Investment Board concur with the November 16, 2011 action to approve the final monitoring report for OET Adult and Dislocated Worker program for PY 2010-11. A summary of findings, observations and actions taken by WIB and OET staff to resolve any issues follows:

## **Findings:**

There was one initial finding regarding a lost file. Upon further review it was determined that the file was accounted for under a different name. The finding was resolved and closed. No further action is necessary.

## **Observations:**

1. WIB staff evaluated and monitored OET's new "Learning Lab" configuration, WIB staff met with OET Member Services Staff and participated in a mock core self-service registration, online orientation, completed a resume and established an email account. Other areas evaluated were eligibility, initial assessment and job referral services conducted during core registration. WIB staff also monitored OET's enrollment process through Pathway to Success, Member Services and Assessment. The OET Management Analyst for program staff was interviewed to determine the type and number of workshops conducted. WIB staff concluded that the staff member conducting the initial in processing of core service activities for "mock" applicant was very well prepared, professional and knowledgeable.

  
\_\_\_\_\_  
Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board  
This report was prepared by: Marleen Esquerra, Management Analyst

\_\_\_\_\_  
11/18/2011  
Date

2. OET's exit strategy or action plan to determine "Entered Employment" outcomes for Adult Services Common Measures prior to the "soft exit" date needs to be reviewed periodically by program staff and supervisors to ensure performance goals are met. During the file review it was noted that all files were "soft exited" within 90 days from the last activity date. The EDD Base Wage File was used to determine if the participant was employed during the first quarter after the exit quarter.
3. During the PowerPoint presentation given by OET staff to new staff, WIB staff observed and identified two areas that were outdated or no longer in use (Use of club cards and summer youth ages 14-21).

**Recommendations:**

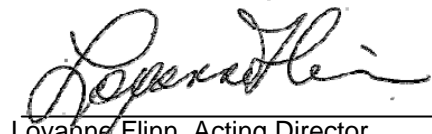
1. It is recommended that OET develop a strategy that includes ongoing and continuous review by program and clerical staff with feedback provided to program supervisors for resolution in circumstances where participants are having difficulty obtaining employment or are identified as likely candidates for Classroom Training, Work Experience and/or On-the-Job-Training. The strategy can also include a methodology to identify participants who have secured a job during the 1<sup>st</sup> quarter after the exit quarter before the information is released or available from the EDD Base Wage file.
2. It is recommended that OET revise their PowerPoint presentation regularly to accurately reflect its current services and program offerings as needed.

**OET Response:**

A corrective action plan has been developed that includes but is not limited to: Developing an Exit strategy prior to "soft exit" in follow up or at a point to determine entered employment during the 1<sup>st</sup> quarter after the exit quarter and prior to the availability of the base wage information; Update the PowerPoint presentation.

**Update WIB Response:**

The Corrective Action Plan provided by OET has been accepted. Future WIB monitoring activity will include an assessment of service delivery to validate the implementation of their stated corrective action.



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Loyahne Flinn, Acting Director

Monterey County Workforce Investment Board

This report was prepared by: Marleen Esquerra, Management Analyst

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11/18/2011

Date

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** APPROVE THE FINAL MONITORING REPORT FOR THE OFFICE FOR  
EMPLOYMENT TRAINING'S RAPID RESPONSE PROGRAM (PY) 2009-10  
AND 2010-11  
**DATE:** DECEMBER 07, 2011

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This monitoring review is to report the results of the WIBs staff contract compliance monitoring for the Workforce Investment Act (WIA) Title I activities performed by the Office for Employment Training for the Rapid Response (RR) grant activities for two Program Years 2009-10 and 2010-11. The monitoring review covered both July 1, 2009 – June 30, 2010 and July 1, 2010 – June 30, 2011 time periods. The report focused on the areas of program oversight, staff time distribution and fiscal expenditures.

A program exit interview was conducted on September 22, 2011 with Employment Services Branch Director Barbara Verba, and Program Manager, Rod Powell, with an opportunity to respond to any issues or concerns.

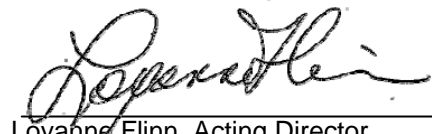
A consolidated draft monitoring report was issued to OET on July 11, 2011. WIB staff received OET's corrective action response on August 16, 2011.

To augment efficiency, WIB staff will establish a linkage and develop a matrix between the EDD Rapid Response Agency and OET RR team coordinator. The linkage will involve specific points of contact of agencies responsible for receiving, posting or publishing WARN information and the distribution process. The primary point of contact to receive WARN Notices from various agencies will be the OET RR coordinator or Management Analyst.

It is recommended that the Workforce Investment Board concur with the November 16, 2011 action to approve the final monitoring report for OET RR activities for PY2009-10 and PY 2010-11. A summary of findings, observations and actions taken by WIB and OET staff to resolve any issues follows:

**Findings:**

There was one finding regarding OET staff time distribution. This finding will remain open until OET RR staff can provide evidence to substantiate approximately 173.5 hours charged to the RR grant by the RR coordinator for the period September 2010 to November 2010.



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Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board  
This report was prepared by: Manley Bush, Management Analyst

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11/21/2011  
Date

**Observations:**

1. No issues were noted in the accurate application of cost allocation. The RR grants for PY 2009-10 were fully expended. For PY 2010-11, one of two RR grants was fully expended. The second grant total plan allocation was \$232, 360 with a remaining balance of \$176, 535 to be carried over into PY2011-12. The RR team is knowledgeable and efficient in responding to all RR activities in Monterey County.
2. The EDD form 121 and WIB monthly reports were submitted in a timely manner.
3. WIB staff noted that OET RR team does not have a policy or procedures in place to clearly define the roles and responsibilities of RR team for both RR and Layoff Aversion activities.
4. To insure consistency and standardization, OET RR team should update their RR Power Point presentation.

**Recommendations:**

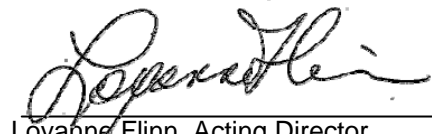
1. OET develop a RR policy and procedures that define the roles and responsibilities of the RR team and Lay-off Aversion activities.
2. It is recommended that OET revise their PowerPoint presentation regularly to accurately reflect its current services and program offerings as needed.

**OET Response:**

1. OET concurs that Layoff Aversion is an emerging strategy within RR efforts. With that in mind, OET is actively exploring best practices and identifying strategies to determine the appropriate action.
2. OET concurs with the need to regularly update the RR information as it becomes available. The RR team is in the process of updating the power point presentation to include current data and the new EDD Debit Cards being issued

**Update WIB Response:**

The Corrective Action Plan provided by OET has been accepted. Future WIB monitoring activity will include an assessment of service delivery to validate the implementation of their stated corrective action.



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Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board  
This report was prepared by: Manley Bush, Management Analyst

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11/21/2011  
Date

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** APPROVE THE FINAL MONITORING REPORT FOR THE CALIFORNIA GANG REDUCTION INTERVENTION AND PREVENTION (CALGRIP) PROGRAM FOR PY 2009-10  
**DATE:** DECEMBER 07, 2011

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This monitoring review is to report the results of the WIB's staff contract compliance monitoring for the Workforce Investment Act (WIA) Title I activities performed by the Office for Employment Training for the Adult and Dislocated Worker grant activities for Program Year 2010-11. The monitoring review covered the time period of July 1, 2010 through December 31, 2010. The report focused on the areas of compliance with the provisions of the WIA, associated regulations, policies and the local plan. Information collected for this report was obtained through MIS reports, interviews with enrolled participants, staff, and observations.

A program exit interview was conducted on September 22, 2011 with Employment Services Branch Director Barbara Verba, and Program Manager, Rod Powell, with an opportunity to respond to any issues or concerns.

A consolidated draft monitoring report was issued to OET on July 11, 2011. WIB staff received OET's corrective action response on August 16, 2011. OET was issued their final report on August 25, 2011.

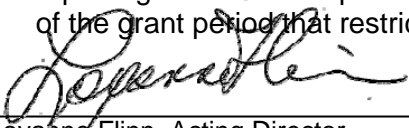
It is recommended that the Workforce Investment Board concur with the November 16, 2011 action to approve the final monitoring report for CalGRIP program for PY 2009-10 and 2010-11. A summary of findings, observations and actions taken by WIB and OET staff to resolve any issues follows:

**Findings:**

There were no findings noted during the review.

**Observations:**

1. WIB staff noted that 7 of 13, or 54% of OET CalGRIP files reviewed were missing Reviewer's Signature and no evidence that eligibility was approved in accordance with WIA JTAS Client Forms Handbook. Applicant statements were used in 9 of 13 files or 69% of the files reviewed. Three of 13 files had numerous supportive service issues.
2. Recidivism has been a recurring issue in helping participants completes the program successfully. From the period July 1, 2009 to present a total of 22 participants discontinued with the program due to probation violations, repeat felony offenses or re-incarcerated.
3. The current case management system in the Virtual One-Stop (VOS) provide staff with a tool to enter and retrieve participant data regarding registration, enrollment, placement, follow up and reporting. There were specific challenges that surfaced at the beginning and during the course of the grant period that restricted the exchange of information between partners.

  
Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board  
This report was prepared by: Manley Bush, Management Analyst

11/21/2011  
Date

**Recommendations:**

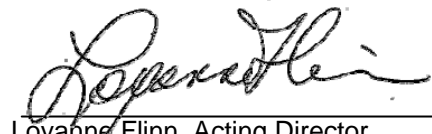
1. Recommend OET develop an action plan that includes a strategy and administrative oversight for the file review. The strategy should include an ongoing and continuous monitoring by program staff with feedback provided to program supervisors or program analyst for resolution in circumstances where files need to be reviewed and approved. The plan should also include a methodology how to insure supervisors provide more oversight and technical support for case-managers.
2. Follow-up services have continued to be extended to participants that were exited due to recidivism or could not be located.
3. Recommend on-going training in VOS is made available to all grant partners responsible for data entry into the VOS system. The training should focus on development of ADHOC reports and standard templates on specific program information with examples for partners to follow that include required information necessary to accurately retrieve consistent MIS data for monthly reports.

**Response from OET:**

1. As part of the noted challenges in the monitoring report, it was identified that files did not show specific evidence of having eligibility approved in accordance with the Client Forms Handbook. It should perhaps be also noted at the time of the eligibilities, OET was operating under the basic guidelines of the "Learning lab" and noting that the application itself did not require applicant or staff signature. The VOS system adheres to WIA regulation and indicates eligibility for participants. The Client Forms Handbook is setup for a more manual system and, at the time was being "updated" to include the idea of a paperless system. We recognize that since that time, the handbook has been updated and again is asking for signatures.
2. Recidivism is always a problem with the population intended for this grant. We are attempting to work with a population of high risk individuals. The recidivism rate in Monterey County for those who have been incarcerated is currently over 70%. The recidivism rate for this group was only 26% which is actually a good sign.
3. There were significant issues with the VOS system. The intent was to be able to share records and services throughout the system and the partners which did not happen and was inconsistent. This was actually the first time we attempted to share data in VOS. Further study needs to be made on this practice in order to accomplish the goals we had in mind.

**Update WIB Response to OET:**

WIB staff accepts OET's corrective action response as stated. No further action will be necessary. However in future monitoring reviews WIB staff will validate and test OET's WIA related collaborative program components for compliance.



Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board  
This report was prepared by: Manley Bush, Management Analyst

11/21/2011  
Date

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** APPROVE THE FINAL ON-THE-JOB TRAINING POLICY  
**DATE:** DECEMBER 7, 2011

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**RECOMMENDATION:**

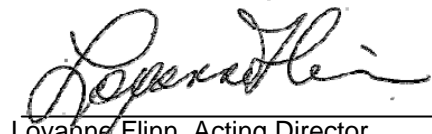
It is recommended that the Workforce Investment Board review and accept the Monterey County Workforce Investment Board's (MCWIB) On-The-Job Training Policy.

**DISCUSSION:**

The On-the-Job Training Policy was modified to reflect trainee wages of \$10.50 per hour and the addition of verbiage about Workkeys consistency between ITA, subcontracts and OJT.

**ATTACHMENT:**

Information 07a



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Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board  
This report was prepared by: Stephanie Shonley, Management Analyst

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11/21/2011  
Date

**Monterey County Workforce Investment Board (WIB)**  
LOCAL POLICY BULLETIN #2011-05

Effective Date: *August 3, 2011, WIB meeting*

**TO:** All Monterey County System Providers

**SUBJECT:** **On-the-Job Training (OJT) Policy**

**PURPOSE:** The purpose of this policy is to provide guidance and criteria used in the development of and the administration of On-the-Job Training (OJT) contracts.

**REFERENCE:** WIA 101(31), WIA Final Rule, 20 CFR; Part 652, 663.700 through 663.720.

**POLICY:**

**I. Overview of OJT**

OJT is one strategy for individuals to receive training funded through the Workforce Investment Act (WIA). The term "on-the-job training" 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 for the costs associated with training the OJT trainee, which are usually calculated at half the pay rate for the agreed-upon training period; and
- Is limited in duration as appropriate to the occupation for which the participant is being trained, taking into account the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate.

**II. Length of Training**

An OJT contract must be limited to the period of time required for a participant to become proficient in the job for which the training is designed. In determining the appropriate length of the contract, consideration should be given to the skill requirements of the job, the academic and occupational skill level of the participant, prior work experience, and the participant's individual employment plan or service strategy. The training plan must describe a timeline for completion of the training.

**III. Training Reimbursement**

Employers providing an OJT can receive reimbursement for a portion of the hourly pay rate – typically up to 50% -- which is considered payment for extraordinary costs to the employer associated with training a new employee.

**IV. Outreach Strategies**

Outreach can be done directly or indirectly to both employers and job seekers. Outreach includes, but is not limited to: face-to-face contacts, direct mailers, press releases, involvement with the Chamber of Commerce and networking with other agencies.

**V. Employer Pre-Screening for OJT**

OJT is provided under an agreement with an employer in the public, private non-profit, or private sector. Prior to entering into an OJT agreement, a pre-screening should be conducted to ensure that the employer meets the minimum standards and can provide both training and long-term employment to an OJT trainee. Prior to engaging an employer in an OJT, local service providers must ensure:

- Worker Adjustment & Retraining Notification Act (WARN) notices have previously been filed;
- The company has not exhibited a pattern of failing to provide OJT trainees with continued long-term employment;
- Company verifies WIA funds will **not** be used to relocate operations in whole or in part;
- Company has operated at current location for at least 120 days. If less than 120 days and the business relocated from another area in the U.S and individual(s), employees were not laid off at the previous location as a result of the relocation;
- Company commits to providing an opportunity for long-term employment for successful OJT trainees;
- If the company has a collective bargaining agreement, the OJT contract does not impair existing contracts for services or collective bargaining agreements. If, as a program



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authorized under title I of WIA, the OJT would be inconsistent with a collective bargaining agreement, the program obtains written concurrence from the appropriate labor organization and employer before the OJT activity begins;

- OJT funds will not be used to directly or indirectly assist, promote or deter union organizing;
- The OJT will not result in the full or partial displacement of employed workers;
- Trainee wages to be paid are at least equal to:
  - ✓ \$10.50 per hour
  - ✓ Other employees in the same occupation with similar experience;
- Trainees will be provided the same workers' compensation, health insurance, unemployment insurance, retirement benefits, etc. as regular, non-OJT employees; and
- The employer will comply with the non-discrimination and equal opportunity provisions of WIA and its regulations.
- Applicants have been assessed using the WorkKeys® Readiness Indicator tool to determine an individual's readiness for WorkKeys® testing. Based upon the testing results, participants are either referred to the Worldwide Interactive Network (WIN) for remediation training or referred to an Authorized WorkKeys® location to complete an assessment. Authorized WorkKeys® assessments and WIN remedial training may be provided by appointment through partners of the Central Coast Career Readiness Consortium by contacting the Monterey County Business Council at (831) 883-9443 or Salinas One Stop Career Center at (831) 796-3600.

## **VI. OJT Trainee Requirements**

Only those individuals who meet the eligibility requirements for intensive services (*Reference WIA Eligibility Technical Assistance Guide, WIB Policy 2011-03 Tiered Service Levels – Core, Intensive and Training Services and WIB Policy 2011-01 Lower Living Standard Income Level and Poverty Guidelines*), who have received an assessment and for whom an Individual Employment Plan (IEP) has been developed may be considered for OJT, as well as any type of training under WIA.

An individual referred to a One Stop Career Center by an employer may be considered for OJT with that employer only after the individual has met intensive services eligibility requirements for the identified funding stream, received an assessment, and for whom an IEP has been developed which indicates an OJT is appropriate based upon the skill requirements of the occupation; the academic and occupational skill level of the participant; the participant's prior work history and experience; and the participant's level of commitment to program services and likeliness to succeed. The IEP documentation of a participant's appropriateness for OJT is required prior to employer selection.

A variety of assessment instruments are available to assist in the determination of participant/trainee suitability, to include the WorkKeys Readiness Indicator. The selection of appropriate assessment instruments is based upon the individual needs of the participant and training employer.

## **VII. Required Documents**

To encourage the use of OJT by employers and job seekers, it is critical that the OJT providers keep paperwork to a minimum. However, there are several documents required to effectively implement an OJT including OJT contracts, training plans (IEPs), invoicing and monitoring documentation. An OJT is considered a program cost under WIA and should be reported as such on financial reports.

### **A. OJT Contract Minimum Requirements**

Contracts are the terms and conditions that the employer and OJT provider agree to provide for an OJT experience. At a minimum, an OJT contract must comply with the requirements of WIA rules and regulations including identifying the occupation, skills and competencies to be learned, and the length of time the training will be provided. Contracts should also include requirements specific to the state and local areas and the requirements specific to OJTs funded through other federal programs. An OJT contract is considered to be a legally binding agreement between the employer and OJT provider.

Local OJT providers must conduct an employer orientation with each employer and/or employer representative to discuss the contract provisions and training plans. OJT employers must be aware of the following:

- OJT participants must receive wages and fringe benefits equal to those similarly



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employed by the employer;

- The reimbursement mechanisms of an OJT are not a wage subsidy;
- It is expected that the participant will continue working after the payments to the employer end; and
- It is expected that participants who complete an OJT will continue to receive compensation and benefits commensurate with the job performance.

### **B. Training Plans**

After determination of the occupation in which the participant will be trained, an OJT training plan must be developed to allow for the monitoring of agreed upon contract provisions and the progression of the established training program. The training plan becomes the work statement of the contract and should serve as a guide when delivering training. This plan will be a formal and written program of the structured job training that will provide participants with an orderly combination of instruction in work maturity skills, general employment competencies and occupationally specific skills that will enable the participant to work toward self-sufficiency. OJT providers can use O\*NET and/or a company job description as a basis to begin listing skills or tasks. Skill descriptions should be concise and comprehensive and ensure that individual tasks are both measurable and observable. All OJT Training Plans must include:

1. Trainee information - name & contact information of participant and Social Security #;
2. Employer information – name and contact information;
3. OJT information – start and end dates, wage rate, and reimbursement rates;
4. Occupational information – job title & description, O\*NET code, and # of hours per week. O\*NET should not be relied upon exclusively at the risk of overlooking the needs, skills, and abilities of the participant and the specific needs of the employer;
5. Job skills – skills necessary to perform the job and the trainee’s skill level for each;
6. Training information - list of specific skills or tasks the employer agrees to provide to the participant, estimated training hours for each skill, and acknowledgement of skill obtained; and
7. Signatures - of trainee and date, of employer and date, and of OJT provider and date.

### **C. Invoicing**

Payments to employers for OJT shall be in compliance with WIA program guidelines and must not be in excess of 50 percent of the wage rate of the OJT participant. Payments to employers are in compensation for the “extraordinary costs” associated with training participants. Employers are not required to document these extraordinary costs associated with training of participants, which may include more intense supervision; abnormal wear on tools; down time; and lower rates of production.

Payment to employers should be managed by an invoice system that clearly documents the number of hours worked each day by the participant and rate of pay for the time period. Invoices must be signed by both the participant and the employer or only by the employer if accompanying documentation (timesheets/time cards) is signed by the participant and reconciled to the invoice. Also, payments to employers must be based on scheduled raises and regular pay increases, if they occur.

### **D. Other Terms & Conditions, WIA General Assurances and Certifications**

All contacts and OJT employers must adhere to the Other Terms & Conditions, WIA General Assurances and Certifications as written by the Monterey County WIB.

### **E. Monitoring**

Monitoring is the responsibility of both the state and the local area, though the duty may be assigned to another designated entity or individual. Monitoring at the local level will include oversight of the participant training and corresponding employer payroll records. To ensure validity and propriety of the reimbursement amounts claimed, and that the training for which the contract is written is actually delivered, on site monitoring of OJT employers is required. The on-site monitoring of the OJT must include documenting information received directly from the trainees, should capture the trainee supervisor’s perspective about how the training is progressing, and should include review of the employer payroll records.

## **VIII. Additional Resources**

The **OJT Toolkit** (available at [www.ojttoolkit.workforce3one.org](http://www.ojttoolkit.workforce3one.org)) has a variety of OJT

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## ACTION 07a

resources, documents and samples to aid OJT providers in implementing their OJT policy and procedures. Visit this site to download customizable OJT documents to aid states and local areas in expanding the use of OJT.

For the purposes of administering OJT contracts under the **National Emergency Grant (NEG) OJT** grant, visit [http://www.doleta.gov/layoff/OJT\\_Policy\\_QA.cfm](http://www.doleta.gov/layoff/OJT_Policy_QA.cfm) for a list of OJT NEG program and policy information.

**INQUIRIES:** For questions or assistance related to this policy, please contact the Monterey County Workforce Investment Board (MCWIB) staff at (831) 796-6434.

This policy will be posted to the MCWIB website located at: [www.montereycountywib.org/policies/](http://www.montereycountywib.org/policies/)



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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** PROGRAM YEAR 2010-2011 WIB ANNUAL REPORT  
**DATE:** DECEMBER 7, 2011

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**RECOMMENDATION:**

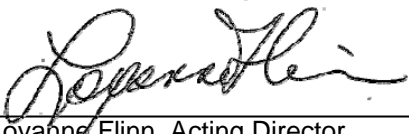
It is recommended that the Workforce Investment Board review and accept the Monterey County Workforce Investment Board's (MCWIB) Annual Report for Program Year 2010-2011.

**DISCUSSION:**

The MCWIB Annual Report for Program Year 2010-2011 began on July 1, 2010 and ended on June 30, 2011. This report provides insight on the mission and strategic plan of the WIB, information on the functions of a WIB, local labor market and unemployment data, participant enrollment data, performance trends, partnerships, funding and service delivery through Workforce Investment Act programs. The MCWIB Annual Report for Program Year 2010-2011 began July 1, 2010 and ended June 30, 2011. For detailed information about the Workforce Investment Board, please visit our website at [www.montereycountywib.org](http://www.montereycountywib.org).

If you have questions or concerns about the data provided, please contact Stephanie Shonley at 831-796-6410 or [shonleys@co.monterey.ca.us](mailto:shonleys@co.monterey.ca.us).

The MCWIB Annual Report will be distributed at the meeting.



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Loyanne Flinn, Acting Director  
Monterey County Workforce Investment Board  
This report was prepared by: Stephanie Shonley, Management Analyst

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11/21/2011  
Date

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING WIB EXECUTIVE DIRECTOR  
**SUBJECT:** DISCUSSION AND UPDATE ON THE DISPOSITION OF THE MONTEREY COUNTY HEALING POLE.  
**DATE:** DECEMBER 07, 2011

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**DISCUSSION:**

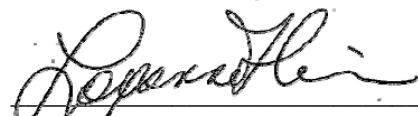
Ms. Diana Carrillo, Chair of the Monterey County Youth Council will discuss and update the members of the WIB Committee on a proposal to move and relocate the Monterey County Healing Pole from its present location in front of the Monterey County One-Stop Career Center to another proposed location at 12<sup>th</sup> Street on the former Fort Ord, across from the Veterans Transition Center.

**INFORMATION AND BACKGROUND:**

The One Voice public art project was created during the summer of 2002. One Voice had been given five 23-25foot Alaskan Cedar logs that were remnants of the Port Chicago disaster of July 1944, with the stipulation that they create a sculpture out of it and give it to a community in need of healing.

A master carver, Shane Eagleton, was hired by the County of Monterey to work with the youth from the Monterey County Office for Employment Training and direct the project in collaboration with the Monterey County Youth Council and the local Workforce Investment Board. With no training as artists, 20 "At Risk" youth sculpted the log using clay models, sketches, chisels and mallets. Eagleton carved a DNA helix into the log and the youth added 86 endangered species, to show the "connectivity of all animals and plants," noted Eagleton. Youth participant Jaymes Lambert said, "People were kind of timid with each other at first, but we all worked together great, and the project turned out to be something wonderful."

The City of New York accepted one of the healing poles from the youth of Monterey County as its first commemorative gift in recognition of the September 11 tragedy. On September 5, 2002, the pole was installed at the front gate of Bronx Zoo. A documentary on the pole, sponsored by the California State Youth Council and California Workforce Association, was seen by over 20 million people on 20 public television stations.



Loyanne Flinn, Acting WIB Executive Director,  
Monterey County Workforce Investment Board

This report was prepared by Manley Bush, Management Analyst

11/18/2011

Date

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# MEMORANDUM

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**TO:** WORKFORCE INVESTMENT BOARD (WIB)  
**FROM:** LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR  
**SUBJECT:** ECONOMIC DEVELOPMENT COMMITTEE UPDATE  
**DATE:** DECEMBER 7, 2011

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**DISCUSSION:**

The Economic Development Committee continues to guide the preparation process to prepare a County-wide economic development strategy plan, which furthers the efforts of the Board of Supervisors #1 Strategic Initiative - Economic Development:

*“Actively engage in appropriate economic development to ensure a County-wide perspective in support of a diversified economy, higher paying jobs and an expanded revenue base for local government services, while preserving and protecting the County’s agricultural base.”*

On October 24th, the Board Economic Development Committee received Stanford Research Institute's (SRI) draft presentation, on Phase One of the Strategic Planning Process, which highlighted the County's strength's weaknesses, opportunities and threats. In addition, SRI also identified the four proposed economic development initiatives:

- 1) **Agriculture:**  
*Ag Rail Facility ~ Wine Industry ~ Salinas Agricultural Innovation Program*
- 2) **Tourism:**  
*Eco-Recreation ~ Motor Sport Opportunity ~ Highway 156 Improvement*
- 3) **Education/Research:**  
*Homeland Defense Consortium ~ Institute for Innovation and Economic Development/Project 17 ~ Marine Research/Moss Landing*
- 4) **Fundamental Initiatives Small Business:**  
*Organizational Capacity ~ Technical Assistance/Living Laboratory ~ Lending*

As we move forward with vetting the above initiatives, we will be focusing on presenting one initiative per Economic Development Committee Meeting. Therefore, at the next **Board Economic Development Committee Meeting**, scheduled **Monday, December 12th, 3 p.m. - 4:30 p.m., Monterey Conference Center, One Portola Plaza, Monterey**, we will be presenting the recommended Tourism Initiative. County staff is meeting with key stakeholders to vet the Tourism Initiative and discuss implementation plans for consideration by the Committee. The Education/Research Initiative will be on the agenda for the February 9, 2012 Board Economic Development Committee Meeting.




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Loyanne Flinn, Acting Executive Director  
 Monterey County Workforce Investment Board

This report was written by: Jim Cook, Director, Monterey County Economic Development Department

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11/21/2011  
 Date