



PUBLIC MEETING NOTICE

Monterey County Workforce Investment Board (WIB)

OVERSIGHT COMMITTEE

100 Campus Center/University Corporation Bldg 201, bottom floor in the Annex Room
(Located at the corner of Inter-Garrison and 6th Ave, in the Olli Bldg. The parking lot is adjacent.)

Thursday, August 11, 2011

8:30 a.m.

Erik Cushman,
WIB & Executive Chair

Joanne Webster,
WIB Vice Chair

Anthony Aniello,
WIB 2nd Vice Chair

David Bernahl,
Past WIB Chair

Oversight Committee Members:

Mary Ann Leffel,
Chair

Al Davis
Dr. Phoebe Helm
Cesar Lara
Lupe Palacio
Judith Profeta
Ken Scherpinski
Larry Silva
Teresa Sullivan
Brian Turlington

Monterey County
Workforce Investment
Board (WIB)

Loyanne Flinn,
Acting Executive Director

168 West Alisal Street
Salinas, CA 93901
(831) 759-6644
flinnlg@co.monterey.ca.us
www.montereycountywib.org

AGENDA

CALL TO ORDER/INTRODUCTIONS

Mary Ann Leffel,
Chair

CHANGES TO THE AGENDA

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

BUSINESS MEETING

- | | |
|---|------------------|
| 1. Action: Approve the minutes of the April 14, 2011 Oversight Committee meeting. (<i>Attachment</i>) | Mary Ann Leffel |
| 2. Information: Presentation on the Green Careers Partnership Program. (<i>Attachment</i>) | Blair Mandell |
| 3. Information: Review of Monterey County WIB's local monitoring log. (<i>Attachment</i>) | Marleen Esquerra |
| 4. Information: Review of Monterey County WIB's State and Federal monitoring log. (<i>Attachment</i>) | Loyanne Flinn |
| 5. Information: Review of Monterey County Local Workforce Investment Areas (LWIA) revenue and expenditures. (<i>Attachment</i>) | Loyanne Flinn |
| 6. Information: Discussion and review regarding the services and activities of Shoreline's Adult Program for PY 2010-11. (<i>Attachment</i>) | Wil Moore |
| 7. Information: Discussion and review regarding the services and activities of Turning Point's Adult Program for PY 2010-11. (<i>Attachment</i>) | Rosie Chavez |
| 8. Information: Discussion and review regarding the services and activities of the DSES Employment Services – Office for Employment Training Program for PY 2010-11. (<i>Attachment</i>) | Rod Powell |
| 9. Information: Discussion regarding Workforce 2.0 agency needs assessment of the One-Stop system and next steps. (<i>Attachment</i>) | Loyanne Flinn |
| 10. Information: Update regarding grants. (<i>Attachment</i>) | Loyanne Flinn |

ANNOUNCEMENTS OF EVENTS OR SERVICES

Mary Ann Leffel

Upcoming Oversight Meetings:

- September 8, 2011 – To be cancelled
- October 13, 2011 – (Location TBD)

Upcoming WIB Meetings:

- October 5, 2011 (Location TBD)
- December 7, 2011 (Location TBD)

ADJOURN

Mary Ann Leffel

If requested, the agenda shall be made available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 USC Sec. 12132), and the federal rules and regulations adopted in implementation thereof. Information regarding how, to whom and when a request for disability related modification or accommodation, including auxiliary aids or services may be made by a person with a disability who requires a modification or accommodation in order to participate in the public meeting. To request information, please contact the Monterey County Workforce Investment Board staff at (831) 796-6434 or visit our website www.montereycountywib.org.



Erik Cushman,
WIB & Executive Chair

Joanne Webster,
WIB 1st Vice Chair

Anthony Aniello,
WIB 2nd Vice Chair

David Bernahl, II,
WIB Past Chair

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Monterey County Workforce Investment Board (WIB)

Contact Information

Loyanne Flinn, WIB Acting Executive Director

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Flor Galvan, (831)796-6434, galvanf@co.monterey.ca.us
Stephanie Shonley, (831) 796-6410, shonleys@co.monterey.ca.us

Monterey County One-Stop Career Center Operators

Contact Information



Department of Social and Employment Services, Employment Services – Office for Employment Training (OET)

Barbara Verba, Deputy Director
Phone: (831) 796-1520
Email: verbab@co.monterey.ca.us
Website:
<http://mcdses.co.monterey.ca.us>

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

Barbara Verba, Deputy Director
Phone: (831) 796-1520
Email: verbab@co.monterey.ca.us
Website:
<http://mcdses.co.monterey.ca.us>

Employment Development Department (EDD)

Yuko Duckworth
Phone: (831) 796-3632
Email:
DuckworthY@co.monterey.ca.us
Website:
www.edd.ca.gov

Monterey County One-Stop Career Center Locations

Salinas One-Stop

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

Seaside One-Stop

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

King City One-Stop

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

ACTION #1

UNADOPTED

Notes of the Monterey County Workforce Investment Board
Oversight Committee Meeting
Thursday, April 14, 2011, 8:30 A.M.
Monterey County Business Council Office
1732 Fremont Boulevard, Seaside, CA 93955

MEMBERS PRESENT	REPRESENTING
Mary Ann Leffel (<i>Chair</i>)	Business
Larry Silva	Business
Lupe Palacio	Community Based Organization
Ken Scherpinski	Labor Organizations
Brian Turlington	Business
Al Davis	Community Based Organization
Cesar Lara	Labor Organizations
Teresa Sullivan	Older Americans
Judith Profeta	Business
Loyanne Flinn	Acting WIB Executive Director, Ex-Officio Member
MEMBERS ABSENT	REPRESENTING
Dr. Phoebe Helm	Economic Development/Education
OTHERS PRESENT	REPRESENTING
Rosie Chavez	Turning Point
Wil Moore	Shoreline Workforce Development Services
Harry Gamotan	OET
Lynda Dunn	OET
Miguel Banda	WIB Staff
Manley Bush	WIB Staff
Gloria Torrez	WIB Staff

CALL TO ORDER/INTRODUCTIONS:

Ms. Leffel called the meeting to order at 8:42am. She welcomed those in attendance and called for introductions. A quorum was established.

CHANGES TO THE AGENDA: NONE

PUBLIC COMMENT: NONE.

BUSINESS MEETING:

1. Action: Approve the minutes of the November 2010 Oversight Committee meeting

Motion: Mr. Davis moved to accept the minutes, as stated.

Second: Mr. Silva

Motion Passed Unanimously

2. Information: Review the notes of the February 2011 Oversight Committee meeting

The committee reviewed the notes. Ms. Leffel recommended that the WIB adopt a procedure that would dismiss members and postpone the meeting to the next regularly scheduled date if no quorum is established at a committee meeting. Mr. Turlington noted that discussion of information items can be perceived as a violation of the Brown Act. Ms. Flinn stated that she will forward the recommendation to the Executive Committee.

3. Action: Review the Final Monitoring Report for Shoreline's PY 2010-2011 On-the-Job Training (OJT) program

Mr. Banda reviewed the report as provided in the packet. He added that at the recommendation of WIB staff, Shoreline is working with OET to create a referral system to administer WorkKeys exams. He added that Shoreline has also submitted a corrective plan for their OJT placements in West County.

Motion: Mr. Davis moved to accept the action, as stated.

ACTION #1

Second: Mr. Silva

Motion Passed Unanimously

4. Action: Review the Final Monitoring Report for Turning Point's PY 2010-2011 On-the-Job Training program

Mr. Banda reviewed the report. He added that WIB staff has requested that Turning Point utilize the Virtual One Stop (VOS) system more effectively and primarily.

Motion: Mr. Davis moved to accept the action, as stated.

Second: Mr. Silva

Motion Passed Unanimously

5. Information: Presentation of Fiscal reports for WIA Title I Adult Subcontractors for PY 2010-2011

Mr. Banda reviewed the report as provided in the packet. In response to Ms. Leffel's question, Ms. Flinn replied that Shoreline's fiscal department is behind on their claims. She noted the claims for 2010 would soon be available.

6. Information: Discussion and review regarding the services and activities of Shoreline's Adult Program for PY2010-11

Mr. Moore reviewed the report as provided in the packet. He noted that the fiscal reports for Shoreline were not yet available due to staff capacity. He stated that they will be available by the next meeting. He continued to say that Shoreline has been spending the funds in supportive services as well as OJT. He noted that Shoreline is close to reaching its contractual goal.

7. Information: Discussion and review regarding the services and activities of Turning Point's Adult Program for PY2010-2011

Ms. Chavez reviewed the report as provided. She added that Turning Point has been administering WorkKeys exams and that she would provide the Oversight Committee with a report of participant results. She added that Turning Point's staff has been attending job fairs that have resulted in job placements in previously underserved areas such as South and North Counties.

8. Information: Discussion and review regarding the services and activities of OET and the One-Stop Operation for PY2010-2011

Ms. Dunn reviewed the report as provided in the packet. She added that she plans to have a similar report including demographic data added to the WIB website. In response to Mr. Silva's question, Ms. Dunn replied that placement in employment outcomes will not be available until the State publishes base wage information. In response to Mr. Scherpinski's question, Ms. Dunn replied that participants tend to not provide OET with employment information after they have exited. Ms. Dunn stated that staff capacity is limited and tracking past the required 12-month period is not feasible.

9. Information: Staff salary schedules follow up discussion

The committee reviewed the salary information for 2009; 2010 data will be provided when available.

ANNOUNCEMENTS: None.

ADJOURNMENT:

Motion: There was a motion to adjourn the meeting by Mr. Turlington

Second: Ms. Sullivan

Ms. Leffel adjourned the meeting at 10:16am

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: PRESENTATION ON THE GREEN CAREERS PARTNERSHIP PROGRAM
DATE: AUGUST 11, 2011

DISCUSSION: At the Oversight Committee meeting on August 11, 2011, Mr. Blair Mandell plans to give a presentation on the Green Careers Partnership Program.

INFORMATION: Construction and Energy Companies!

Need to hire someone that is trained and ready to hit the ground running? Don't have the time, resources or money to recruit quality people? Utilize the **FREE** recruitment services of the Green Careers Partnership to fill your positions with highly qualified candidates.

Cabrillo College runs a Construction and Energy Management program, which also offers Certificates in Building Performance Institute (BPI), Building Analyst and North American Board of Certified Energy Practitioners (NABCEP) entry level knowledge certificate. Cabrillo College has been the lead in the state of California for [Construction and Energy Management](#) (CEM) Training. It was the first community college to become a BPI affiliate, to offer solar installation courses, and to teach building science. Students in the CEM program have gone through four semesters of rigorous energy and construction technology training:

- **green construction,**
- **building performance,**
- **solar thermal and**
- **solar photovoltaic installation, and**
- **energy sales**

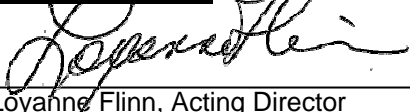
Based on this holistic approach, students are capable of obtaining work in several different types of energy and construction jobs, increasing opportunities for employment after training. Employers have indicated that they need employees that are trained in performing energy assessment, doing green construction, and solar installation. Being trained in all three makes them versatile, able to work on many different projects, and highly employable. The Green Careers Partnership places these individuals with employers.

On-the-Job Training funding is available to employers of Cabrillo graduates that could pay for the first 3-6 months of an employee's time in your shop, if the employee and the company qualify.

The next cohort of Cabrillo CEM graduates are wrapping up course work in the next 2 weeks. They are all ready to work, but are already being placed quickly. Don't miss the opportunity to bring quality people to your workplace, and receive funding to get them started.

Call or email Blair Mandell ([408-772-7850](tel:408-772-7850)) blair@greencareerspartnership.org or Jo Fleming ([831-706-7384](tel:831-706-7384)) jo@greencareerspartnership.org of the Green Careers Partnership immediately to get resumes, schedule interviews, and get funding.

ATTACHMENTS: Green Careers Partnership Program Information



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

08/05/2011
Date



Visit us on:



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Pathways to Prosperity in Clean Green Careers

The mission of the Green Careers Partnership is to create pathways to prosperity in clean, green technology through a multi-stakeholder partnership that focuses on fostering job creation.

The partnership informs training programs, job availability, and future economic development opportunities in Santa Cruz and the Monterey Bay Area, focusing on careers that enhance the local environment and improve opportunities for local businesses and job seekers throughout the three County Monterey Bay region.

The partnership will provide opportunities to under-employed, low-income, minority individuals and women, as well as at-risk youth.

The partnership works to add a workforce development element to every environmental initiative taking place locally in today's green economy.

Latest Jobs [RSS](#)

- [Environmental Programs Specialist - University of California Santa Cruz](#)
- [Landscape Technician - Central Coast Wilds Nursery](#)
- [Landscape Foreman, Landscape Industry Certified Technician - Central Coast Wilds Nursery](#)
- [Inside Sales Representative - Session Solar](#)
- [Cleantech Sales Opportunity in SF Bay Area - RideSpring, Inc.](#)

[Go to Green Jobs Listings](#)

Upcoming Events

[Wed Jul 14 @04:00PM - 08:00PM](#)
[Green Careers Workshop](#)

[Thu Jul 15 @04:00PM - 08:00PM](#)
[Green Careers Workshop](#)

Green Careers Partnership

MISSION

Create pathways to prosperity in clean, green technology through a multi-stakeholder partnership and several key green industry clusters.

The partnership and clusters will inform training programs, job availability, and future economic development opportunities in the Monterey Bay Area, focusing on Santa Cruz County and careers that enhance the local environment and improve opportunities for local businesses and job seekers. The partnership and clusters will provide opportunities to under-employed, low-income, minority individuals and women, as well as at-risk youth. The Partnership will strive to add a workforce development element to every environmental initiative taking place locally in today's green economy.



Training

- Green Job Employers: < 20 employees
- 77 % rely on on the job training OJT- OMG!
- Two years vocational training = \$46-52,000 annual salary
 - Green carpentry, electricians, sustainable farmers, plumbers, and HVAC technicians.



ON-THE-JOB TRAINING ASSISTANCE AND NEW HIRE CREDITS


- Employer Resources: Visit www.greencareerspartnership.org
- Paid apprenticeships, subsidized employment, free screening, etc.
- Proposed New Hire Credit of \$5,000 per new employee.
Work Opportunity Tax Credit.



MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: REVIEW OF MONTEREY COUNTY WIB'S LOCAL MONITORING LOG
DATE: AUGUST 11, 2011

DISCUSSION: At the Oversight Committee meeting on August 11, 2011, WIB staff plan to present an update regarding Monterey County's local monitoring activities for Program Years 2009-10 and 2010-11.



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

08/05/2011
Date

ATTACHMENT: INFORMATION #3

**LOCAL MONITORING LOG
MONTEREY COUNTY LOCAL WORKFORCE INVESTMENT AREA (LWIA)**

Program Year 2010-11

Subrecipients	Notice Sent	Dates of Monitoring	Program	Draft Report	Findings/Observations	Conclusion	Final Report
Office for Employment Training, Rancho Cielo, Turning Point		<i>To be determined.</i>	CALGRIP Gang Reduction, Intervention & Prevention				OC 7/14/2011
Office for Employment Training		<i>To be determined.</i>	WIA Title I Adult, Dislocated Worker and Rapid Response				
Office for Employment Training	07/19/2011	<i>To be determined.</i>	WIA Title I Youth				
Arbor	<i>Contract closed.</i>						
Unity Care Active Youth	10/29/2010	Nov 16 – 19, 2011	WIA Title I – RISE Active Youth Program	01/10/2011	1. Observations: timeliness of entering case notes into VOS, documentation, supportive services.	1. CLOSED	YC 3/15/2011 EC 3/16/2011 WIB 4/6/2011
Unity Care Follow-up Youth	10/29/2010	Nov 16 – 19, 2011	WIA Title I- RISE Follow-UP Program	01/10/2011	1. Observations: timeliness of entering case notes into VOS, documentation, supportive services.	1. CLOSED	YC 3/15/2011 EC 3/16/2011 WIB 4/6/2011
Shoreline Adult	Jan 2011	Feb 7 - 10, 2011	WIA Title I Adult OJT	03/25/2011	1. Finding: WorkKeys readiness indicators	1. CLOSED, Annual review.	YC 4/14/2011 EC 4/20/2011 WIB 6/1/2011
Turning Point Adult	Jan 2011	Feb 28 – Mar 3, 2011	WIA Title I Adult OJT	03/25/2011	1. Observations: timeliness of entering case notes into VOS, documentation, geo and demo goals	1. CLOSED, Annual review.	YC 4/14/2011 EC 4/20/2011 WIB 6/1/2011
Turning Point Youth	Feb 2011	Mar 3 – 10, 2011	WIA Title I - Youth	03/30/2011	1. Observations: timeliness of entering case notes into VOS, documentation, geo and demo goals	1. CLOSED, Annual review.	YC 6/14/2011 EC 7/20/11
Monterey County Business Council	Aug 2010	Aug 24 – Sep 24, 2010	Rapid Response ARRA Layoff Aversion	12/21/2010	1. Observation: Timeliness of contract execution and better communication.	1. CLOSED	EC 2/16/2011 WIB 4/6/2011

ATTACHMENT: INFORMATION #3

**LOCAL MONITORING LOG
MONTEREY COUNTY LOCAL WORKFORCE INVESTMENT AREA (LWIA)**


Program Year 2009-10

Subrecipients	Notice Sent	Dates of Monitoring	Program	Draft Report	Findings/Observations	Conclusion	Final Report
Office for Employment Training	6/30/2011	To be determined.	WIA Title I Adult and Dislocated Worker				
Office for Employment Training	04/28/2010	May 12 – June 3, 2010	WIA Title I Youth	7/30/2010	1. Observations: working beyond capacity, repetitive case notes, reassignments, and WorkKeys.	1. CLOSED Follow-up in YC meetings	YC 9/13/2010 EC 09/29/2010 WIB 10/06/2010
Office for Employment Training	06/2010	June 15 – August 31, 2009	WIA Title I Youth ARRA	09/18/2009	1. Observations: documentation.	1. CLOSED	YC 11/09/2010 EC 12/21/2009 WIB 01/06/2010
Arbor Adult	03/15/2010	Mar 29 – Apr 2, 2010	WIA Title I - Adult	4/16/2010	1. OJT Enrollments below plan 2. Underserved Geographical Enrollments 3. Underserved Demographic Enrollment	1. CLOSED* 2. CLOSED* 3. CLOSED* *Annual review.	OC 5/13/2010 EC 05/26/2010 WIB 6/2/2010
Unity Care Active Youth	01/12/2010	Jan 25 – 29, 2010	WIA Title I – Active Youth Program	2/24/2010	1. VOSfile documentation observations 2. Enrollment and Expenditure observations 3. Petty Cash Policy 4. Single Audit	1. CLOSED 2. Follow-up in YC meetings 3. OPEN 4. OPEN	YC 5/10/2010 EC 5/26/2010 WIB 6/2/2010
Unity Care Follow-up Youth	01/12/2010	Jan 25 – 29, 2010	WIA Title I – Youth Follow-up Program	2/24/2010	1. VOSfile documentation observations 2. Enrollment and Expenditure observations 3. Petty Cash Policy 4. Single Audit	2. CLOSED 3. Follow-up in YC meetings 4. OPEN 5. OPEN	YC 5/10/2010 EC 5/26/2010 WIB 6/2/2010
Shoreline Adult	01/23/2010	Feb 8 – 12, 2010	WIA Title I – Adult OJT	2/23/2010	1. Observation: No written allocation plan or policy 2. Finding: Underserved Geographical Enrollments	1. CLOSED* 2. CLOSED* *Annual review.	OC 5/13/2010 EC 05/26/2010 WIB 6/2/2010
Turning Point Adult	02/16/2010	Mar 2 – 5, 2010	WIA Title I – Adult OJT	4/16/2010	1. Finding: OJT Enrollments below plan 2. Finding: Underserved Geographical Enrollments 3. Finding: Underserved Demographic Enrollment	1. CLOSED* 2. CLOSED* 3. CLOSED* *Annual review	OC 5/13/2010 EC 05/26/2010 WIB 6/2/2010
Turning Point Youth	02/16/2010	Jul 1, 2009 – Feb 28, 2010	WIA Title I - Youth	3/30/2010	1. Finding: Underserved Geographic Enrollment 2. Observation: Eligibility need to verify documentation	1. CLOSED 2. CLOSED	YC 5/10/2010 EC 5/26/2010 WIB 6/2/2010

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: REVIEW OF MONTEREY COUNTY WIB'S STATE AND FEDERAL MONITORING LOG
DATE: AUGUST 11, 2011

DISCUSSION: At the Oversight Committee meeting on August 11, 2011, WIB staff plan to present an update regarding Monterey County's State and Federal monitoring activities for Program Year 2010-11.



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

08/05/2011
Date

**STATE & FEDERAL MONITORING LOG
MONTEREY COUNTY LOCAL WORKFORCE INVESTMENT AREA (LWIA)**

Program Year 2010-11

Notice Sent	Dates of Monitoring	Program Review	Draft Report & Response	Findings/Observations	Conclusion	Final Report
State Employment Development Department (EDD) Workforce Service Branch & Compliance & Review Division (CRD) 03/04/2010	Mar 15-18, 2010	American Recovery and Reinvestment Act (ARRA) Program Admin, local level monitoring, MIS reporting, incident reporting, nondiscrimination & equal opportunity, grievance and complaint system and program operations to include ARRA activities and participant eligibility.	State EDD – CRD 04/15/2010 Local response to EDD report 05/19/2010	<p>1. Finding 1: Office for Employment Training (OET) does not maintain eligibility documentation for adult and dislocated worker participants. A check list is currently used to determine that eligibility docs have been reviewed. Recommendation: OET to provide copies of source eligibility docs for selected participants.</p> <p>2. Finding 2: Four participant files lacked supportive services docs. Recommendation: OET provide documentation of the costs in accordance with local policies.</p> <p>3. Finding 3: One participant was assigned an individual training account (ITA) of \$5,318. The ITA limit is \$5,000 per person in accordance with local policy. Recommendation: OET must document the reason for exceeding the ITA limit and provide a corrective action plan.</p> <p>4. Finding 4: OET staff are placing laid off or terminated participants back with the same employer for work experience in the same position without justification. Recommendation: since work experience is designed to provide individuals with training to gain actual work opportunities and learn specific skills, it is unclear as to the “new” skills learned in these placements.</p>	<p>1. Finding 1: OET responded with copies of eligibility documents for 55 of the 59 participant files reviewed. Staff are researching docs on the remaining 4. Status: <i>Open</i></p> <p>2. Finding 2: OET responded with justification of supportive service expenditures for the participant files reviewed. Status: <i>Open</i></p> <p>3. Finding 3: OET responded with justification of ITA increase for the participant file reviewed. Status: <i>Open</i></p> <p>4. Finding 4: OET responded with justification of appropriate placement into work experience for the participants in question. However, at the time of this review, State EDD stated OET was unable to justify the appropriateness of the placements and ultimate use of ARRA/WIA funds. Due to the large number of individuals enrolled in a similar manner, State EDD was unable to determine the extent of the issue. Therefore, State EDD referred this issue to EDD’s Audit Section for further review. Status: <i>Open</i></p>	Pending receipt of final report from State EDD.

Notice Sent	Dates of Monitoring	Program Review	Draft Report & Response	Findings/Observations	Conclusion	Final Report
Office of the Inspector General (OIG) – June 2010	June 2010	ARRA funds received and expended for the period of Feb 17, 2009 through Dec 31, 2009. Objectives were to determine if the WIB properly accounted for and used ARRA funds in accordance with applicable laws and regulations.	OIG July 2, 2010 Local response to OIG report July 12, 2010	<ol style="list-style-type: none"> 1. Finding 1: No valid agreement between the WIB and OET. 2. Finding 2: Failure to retain supporting documentation for eligibility determinations. 3. Finding 3: Participants files fail to support training needs. 4. Finding 4: Lack of justifications fuel appearance of revolving door employment. 5. Finding 5: Misuse of ARRA funds to train experienced electricians as electricians. 6. Finding 6: OET is not adequately reviewing contractor's reimbursement requests. 7. Finding 7: OET incorrectly reported jobs created. 8. Finding 8: Failure to seek guidance and clarification of program requirements. 	<ol style="list-style-type: none"> 1. Finding 1: A memorandum of understanding was put into place in 2000. A new MOU was anticipated to be finalized in Aug 2010 and approved by WIB in Oct 2010. 2. Finding 2: At the request of EDD copies of eligibility docs were provided for 55 of 59 participants files. Contact with remaining 4 has not been successful. 3. Finding 3: Case managers have received direction and training to provide clearer case notes articulating determination of need. 4. Finding 4: The placement approach was used due to DOL's expectations to move quickly using ARRA funds and to assist businesses in hiring qualified workers. Locally, layoff aversion services were initiated in recognition of the benefits and were offered to laid off job seekers. 5. Finding 5: WIB acknowledged the fact that the case notes and other means of justification were insufficient. However, the training plan noted the opportunity for the participants to learn new skills, which are deemed appropriate. For participants who worked 24 hours more than they should've should have been reimbursed through their worksites. This error will be corrected and funds will be returned to the ARRA DW grant. 6. Finding 6: Monterey County concurs with the finding that payments to Rancho Cielo for salaries of 2 employees were overpaid in error. Monterey County has requested reimbursement \$4,151.84. 7. At the request of EDD copies of eligibility docs were provided for 55 of 59 participants files reviewed. Contact with remaining 4 has not been successful. <i>Status: Future WIB monitoring will assure adherence to local policies and regulations.</i> 	July 15, 2010. Final report was presented to the full WIB meeting July 21, 2010

Notice Sent	Dates of Monitoring	Program Review	Draft Report & Response	Findings/Observations	Conclusion	Final Report
State EDD Workforce Service Branch & Compliance & Review Division (CRD) 01/04/2011	Jan 31 – Feb 4, 2011	WIA 85% and ARRA program operations for the Adult and DW grants for PY 2009-10 and youth grant for PY 2010-11 to include program admin, participant eligibility, WIA/ARRA activities, local level monitoring, grievance and complaint system and MIS reporting.	Pending receipt of draft report from State EDD.	Results of audit revealed that OET was non-compliant with federal regulations and State and local guidelines based on the following: 1. Finding 1: Dislocated worker (DW) participants received unnecessary training (work exp & OJT) by placement in jobs with the same employer, industries and occupations from which they were laid off. 2. Finding 2: DW participants received unnecessary training being placed in ordinary and standard training that did not upgrade their skills. 3. Finding 3: DW received unnecessary work experience for 3 mo. (480 hrs) and some received additional 3 mo. (480 hrs) even though they had experience with the same employer and occupations. 4. Finding 4: DW participant needs for and duration of work experience and OJT were inadequately documented. 5. Finding 5: Former WIB director received full pay and benefits while on admin leave for 11 months with costs charged to WIA program, in violation of Monterey County's personnel practices & procedures resolution guide which allows a max of 20 days of admin leave. 6. Finding 6: Former WIB director received a terminal leave pay-off that was directly charged to WIA, which should have been charged as an indirect cost.	Findings 1 – 6: Status: Open	Pending local response to State EDD – A&ED
State EDD Audit & Evaluation Division (A&ED) 01/12/2011	Feb – Apr 2011	Monterey County's One-Stop Career Center's policies and procedures for providing job training and placement services in the work experience program, review of participant files enrolled in work experience and review of payroll records and timesheet information for selected One-Stop employees.	State EDD – A&ED July 26, 2011 Local response to EDD report is due Aug 22, 2011. (20 work days from date of report.)			

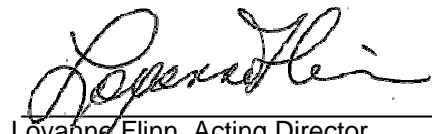
Notice Sent	Dates of Monitoring	Program Review	Draft Report & Response	Findings/Observations	Conclusion	Final Report
State EDD Workforce Service Branch & Compliance & Review Division (CRD) 06/01/2011	Jun 27 – Jul 1, 2011	WIA and ARRA fiscal and procurement procedures, reporting, expenditures charged to the WIA and ARRA grants, cost allocation, cost/resource sharing, indirect cost rate, oversight reporting of subrecipients, audits, procurement transactions for PY 2010-11 and property management.	Pending receipt of draft report from State EDD.			

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: REVIEW OF MONTEREY COUNTY LOCAL WORKFORCE INVESTMENT AREAS (LWIA) REVENUE AND EXPENDITURES
DATE: AUGUST 11, 2011

DISCUSSION: At the Oversight Committee meeting on August 11, 2011, WIB staff plan to review Monterey County Local Workforce Investment Area's (LWIA) revenue and expenditures for Program Years 2006-07 through 2010-11.

ATTACHMENT: Monterey County's LWIA Budget Plan vs. Actual



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

08/05/2011
Date

WORKFORCE INVESTMENT SYSTEM

Workforce Services, Businesses and Job Seekers

	Actual 07/08	Actual 08/09	Actual 09/10	Actual 06/30/2011	PLAN 11/12
TOTAL JOB SEEKERS SERVED	1,321	3,002	6,324	2,049	1,900
NEW Job Seekers	803	2,714	5,229	1,290	1,150
TOTAL BUSINESSES SERVED	294	2,403	2,140	3,626	1,150
New Businesses Registered	93	117	186	180	61%
ONE STOP CAREER CENTER (W-P)	4,196	5,632	7,464	3,537	
TOTAL JOB SEEKERS ENROLLED - SUMMARY	1,321	3,002	6,324	2,049	1,900
ONE STOP CAREER CENTER (DSES-OET)	1,125	2,831	6,086	1,831	1,631
SUBCONTRACTOR	196	171	238	218	269
TOTAL TRAINING - Support/Training Services	1,575	1,308	4,409	1,798	1,631
Total Participant Services	7,660	21,512	50,108	16,219	
Total One-Stop OET Participant Services	6,020	19,492	46,718	12,378	
One-Stop OET Core/Intensive/Youth	4,702	18,598	42,764	11,853	
TRAINING One Stop Support/Training	1,318	894	3,954	525	29%
Total Subcontractor Participant Services	1,640	2,020	3,390	3,841	
Subcontractor Core/Intensive/Youth	1,383	1,606	2,935	2,568	
TRAINING Subcontractor Support/Training	257	414	455	1,273	71%
NEW BUSINESSES REGISTERED - INDUSTRY	93	117	186	180	
Agriculture, Forestry, Fishing & Hunting	2	4	8	6	3%
Construction	16	9	17	9	5%
Manufacturing (31-33)	1	2	3	5	3%
Wholesale Trade	1	4	5	4	2%
Retail Trade (44 & 45)	4	6	13	12	7%
Transportation and Warehousing (48 & 49)	4	2	5	8	4%
Information	2	1	4	3	2%
Finance and Insurance	11	8	13	9	5%
Real Estate and Rental and Leasing	2	5	11	2	1%
Professional, Scientific & Technical Svc	5	9	14	13	7%
Management of Companies and Enterprises	1	0	0	19	11%
Admin., Support, Waste Mgmt, Remediation	13	21	19	0	0%
Education Services	5	6	5	9	5%
Health Care and Social Assistance	3	16	18	26	14%
Arts, Entertainment, and Recreation	3	3	10	4	2%
Accommodation and Food Services	3	9	10	15	8%
Other Services (except Public Admin.)	12	6	23	26	14%
Public Administration	5	6	7	7	4%
NEW BUSINESSES REGISTERED - SIZE					
1-4	20	12	95	105	54%
5-9	10	5	40	28	14%
10-19	9	6	20	23	12%
20-49	7	5	15	9	5%
50-99	5	10	8	7	4%
100-249	5	5	4	7	4%
250-4999	0	1	2	4	2%
500-999	2	2	4	4	2%
1,000-4,999	3	0	2	7	4%
5,000-9,999	1	3	0	0	0%
10,000 +	1	0	4	2	1%

WORKFORCE INVESTMENT SYSTEM
Revenue and Expenditures

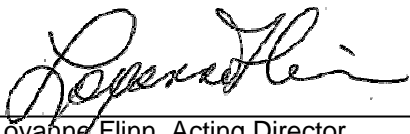
	Actual 07/08	Actual 08/09	Actual 09/10	Actuals 10/11	BUDGET 11/12
TOTAL REVENUE	\$7,514,316	\$14,965,167	\$15,262,355	\$10,012,826	\$7,083,209
WIA FORMULA (Youth, Adult, Dislocated Worker)	\$5,757,404	\$6,895,213	\$6,994,201	\$6,080,592	\$5,190,392
TOTAL ALLOCATION including WIA FORMULA	\$7,039,916	\$14,773,293	\$7,841,287	\$7,614,268	\$5,894,276
CARRY-IN	\$474,400.0	\$191,874	\$7,421,068	\$2,398,558	\$1,188,933
TOTAL EXPENDITURES - SUMMARY	\$7,322,442	\$7,496,581	\$12,881,646	\$10,012,826	\$7,141,177
ONE STOP CAREER CENTER (DSES-OET)	\$4,362,567	\$4,935,703	\$9,728,991	\$6,238,286	\$4,629,081
SUBCONTRACTOR	\$1,460,268	\$1,190,624	\$1,413,494	\$2,164,421	\$1,112,311
ADMINISTRATION	\$730,679	\$709,929	\$699,789	\$767,207	\$637,933
WIB	\$768,928	\$660,325	\$1,039,372	\$842,912	\$761,852
TRAINING dollars and percent	\$603,464	\$463,804	\$1,461,230	\$1,416,269	\$683,647
TRAINING = Total Participant Costs	\$1,030,116	\$927,524	\$4,451,973	\$2,347,469	\$683,647
TOTAL EXPENDITURES - COST CATEGORY	\$7,322,442	\$7,496,581	\$12,881,646	\$10,012,826	\$6,378,496
Total Salaries and Benefits	\$5,114,334	\$5,283,919	\$6,303,460	\$6,639,803	\$4,601,654
One Stop OET Salaries and Benefits	\$2,830,065	\$3,202,827	\$3,858,250	\$3,646,452	\$3,482,547
Subcontractor Salaries and Benefits (+operating)	\$1,180,016	\$988,708	\$1,078,423	\$1,786,315	\$499,832
Administration Salaries and Benefits	\$572,815	\$553,083	\$600,397	\$536,834	\$619,275
WIB Salaries and Benefits	\$531,438	\$539,301	\$766,390	\$670,202	\$683,647
Total Operating Costs (Services & Supplies)	\$1,177,992	\$1,285,138	\$2,126,213	\$1,025,554	\$1,093,195
One Stop OET Operating Costs	\$782,638	\$1,007,268	\$1,753,839	\$622,471	\$812,517
Subcontractor Operating Costs					
Administrative Operating Costs	\$157,864	\$156,846	\$99,392	\$230,373	\$138,101
WIB Operating Costs	\$237,490	\$121,024	\$272,982	\$172,710	\$142,577
Total Participant Costs	\$1,030,116	\$927,524	\$4,451,973	\$2,347,469	\$683,647
Total One-Stop OET Participant Costs	\$749,864	\$725,608	\$4,116,902	\$1,969,363	\$334,017
One-Stop OET Work Exp/Internships	\$426,652	\$463,720	\$2,990,743	\$931,200	\$334,017
TRAINING One Stop OET CRT / OJT	\$162,057	\$109,157	\$517,995	\$650,000	\$334,017
TRAINING One-Stop Support Services	\$161,155	\$152,731	\$608,164	\$388,163	\$349,630
TRAINING Subcontractor	\$280,252	\$201,916	\$335,071	\$378,106	\$349,630
TOTAL EXPENDITURES - FUNDING SOURCE					
Disadvantaged Adult					\$5,477,229
Dislocated Worker					\$1,896,012
Disadvantaged Youth					\$1,540,915
Other					\$1,753,465
					\$286,837

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: DISCUSSION AND REVIEW REGARDING THE SERVICES AND
ACTIVITIES OF SHORELINE'S ADULT PROGRAM FOR PY 2010-11
DATE: AUGUST 11, 2011

DISCUSSION: At the Oversight Committee meeting on August 11, 2011, Wil Moore plans to present a plan vs. actual close-out report update of Shoreline Workforce Development Services On-the-Job Training (OJT) subcontract for Program Year (PY) 2010-11.

ATTACHMENT: Shoreline's OJT Subcontract Monthly Report - Close Out of PY 2010-11



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

08/05/2011
Date

ATTACHMENT: INFORMATION #6



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

Subcontractor / Program: Shoreline Workforce Development Services

For the period ending: June 30, 2011

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

Monthly Participant Plan Summary	Annual Plan	Monthly Plan	Monthly Actual	Monthly %
1. Total number of new enrollments	61	61	59	96.72%
2. Total number of On-the-Job Training (OJT) contracts	58	58	59	101.72%
3. Total number of Work Key Readiness assessments completed			11	
▪ Applied Mathematics				
▪ Reading for Information				
▪ Locating Information				

INDUSTRY CLUSTERS – OJT PLACEMENTS

Monthly Placements	Actual	%
1. Total number and percentage of OJT placements, based on the following industry clusters:	23	38.98%
▪ Agriculture:	1	
▪ Building/Design (<i>Green jobs</i>):	2	
▪ Healthcare:	14	
▪ Education:	6	
▪ Hospitality/Tourism:		
▪ Creative/Technology:		
▪ Other (<i>Finance, Retail, Sales, etc.</i>):	36	

GEOGRAPHIC AREAS SERVED

Quarter ending 6/11	TARGET GOAL	MINIMUM GOAL	Actual	%
Central (Salinas)	55%	10%	29	49%
North	11%	10%	10	17%
South	18%	10%	15	25%
West	16%	10%	5	9%

TARGET POPULATIONS SERVED

Quarter ending 6/11	Plan	Actual	%
Veterans	10%	1	1.69%
Older Workers	5%	2	3.38%
Receiving Temporary Assistance for Needy Families (TANF)	12%	30	50.84%
High School Dropout	20%	12	20.33%
Disabled	16%	2	3.38%
Limited English	10%	4	6.77%
Ex Offender	20%	4	6.77%
Homeless	5%	3	5.08%

PERFORMANCE GOALS

Quarter ending 6/11	Plan	Actual
1. Total number of exits	0	59
2. Entered Employment Rate – <i>entry into unsubsidized employment</i>	75.5%	88%
3. Retention Rate – <i>6 months after entry into unsubsidized employment</i>	76.5%	88%
4. Average Earnings – <i>increased earnings in unsubsidized employment</i>	\$10,500	n/a
5. Average hourly wage		\$10.66

*1ST Qtr Follow up

UPCOMING ACTIVITIES

Activities during the last two months:

- Installed NComputing Devices at Pajaro Rescue Mission.
- Presented at CWA Conference in San Diego
- Received VEAP 15% Grant
- Completed CDF Training-individual projects were presented and reviewed
- Hosted California Training for national VCN-Health Website
- Hosted, along with the WIB and Turning Point, Partner meeting
- Met with the Santa Cruz WIB to discuss regional One Stop Center in Watsonville

TESTIMONIAL


n/a

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: DISCUSSION AND REVIEW REGARDING THE SERVICES AND
ACTIVITIES OF TURNING POINT'S ADULT PROGRAM FOR PY 2010-11
DATE: AUGUST 11, 2011

DISCUSSION: At the Oversight Committee meeting on August 11, 2011, Rosie Chavez plans to present a plan vs. actual close-out report update of Turning Point's On-the-Job Training (OJT) subcontract for Program Year (PY) 2010-11.

ATTACHMENT: Turning Point's OJT Subcontract Monthly Report - Close Out of PY 2010-11



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

08/05/2011
Date



ATTACHMENT: INFORMATION #7

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

Subcontractor / Program: Turning Point of Central California, Inc.
For the period ending: June 30, 2011

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

Monthly Participant Plan Summary	Annual Plan	Monthly Plan	Monthly Actual	Monthly %
1. Total number of new enrollments	60	60	66	110%
2. Total number of On-the-Job Training (OJT) contracts	60	60	66	110%
3. Total number of WorkKeys assessments completed	60	60	65	108%
▪ Applied Mathematics	60	60	65	108%
▪ Reading for Information	60	60	65	108%
▪ Locating Information	60	60	65	108%

INDUSTRY CLUSTERS – OJT PLACEMENTS

Monthly Placements	Actual	%
1. Total number and percentage of OJT placements, based on the following industry clusters:	41	68%
▪ Agriculture:	9	15%
▪ Building/Design (<i>Green jobs</i>): construction	12	20%
▪ Healthcare:	4	7%
▪ Education:		
▪ Hospitality/Tourism: Driver, Host	14	23%
▪ Creative/Technology:	2	3%
▪ Other (<i>Finance, Retail, Sales, etc.</i>): Cashier, Maintenance, Financial Manager, Office Manager, Transportation, Cashier, Automotive, Sales, Pest Control, Marketing, Stocker, Landscaper	25	42%

GEOGRAPHIC AREAS SERVED

Quarter ending _____	TARGET GOAL	MINIMUM GOAL	Actual	%
Central (Salinas)	55%	10%	47	78%
North	11%	10%	3	5%
South	18%	10%	2	3%
West	16%	10%	14	23%

TARGET POPULATIONS SERVED

Quarter ending _____	Plan	Actual	%
Veterans	10%	5	8%
Older Workers	5%	2	3%
Receiving Temporary Assistance for Needy Families (TANF)	12%	N/A	N/A
High School Dropout	20%	33	55%
Disabled	16%	30	77%
Limited English	10%	0	0
Ex Offender	20%	66	110%
Homeless	5%	25	42%

PERFORMANCE GOALS

Quarter ending _____	Plan	Actual
1. Total number of exits	60	66
2. Entered Employment Rate – <i>entry into unsubsidized employment</i>	74%	75%
3. Retention Rate – <i>6 months after entry into unsubsidized employment</i>	76.5%	
4. Average Earnings – <i>increased earnings in unsubsidized employment</i>	10,500	
5. Average hourly wage		\$10.93

ACTIVITIES

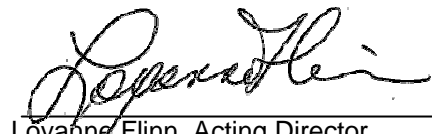
TESTIMONIAL

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: DISCUSSION AND REVIEW REGARDING THE SERVICES AND
ACTIVITIES OF THE DSES EMPLOYMENT SERVICES – OFFICE FOR
EMPLOYMENT TRAINING PROGRAM FOR PY 2010-11
DATE: AUGUST 11, 2011

DISCUSSION: At the Oversight Committee meeting on August 11, 2011, Rod Powell plans to present an update regarding the services and activities of the Department of Social and Employment Services “Employment Services” – Office for Employment Training for Program Year 2010-11.

ATTACHMENT: Program handouts will be provided at the meeting.



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

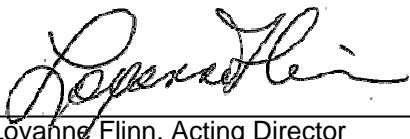
08/05/2011
Date

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: DISCUSSION REGARDING WORKFORCE 2.0 AGENCY NEEDS
ASSESSMENT OF THE ONE-STOP SYSTEM AND NEXT STEPS
DATE: AUGUST 11, 2011

DISCUSSION: At the Oversight Committee meeting on August 11, 2011, WIB staff plan to present an update regarding the Workforce 2.0 agency needs assessment of the One-Stop system and discuss next steps with the committee members.

ATTACHMENT: Agency Needs Assessment – Monterey County



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

08/05/2011
Date

AGENCY NEEDS ASSESSMENT MONTEREY COUNTY WORKFORCE INVESTMENT BOARD

August 3, 2011



This is a confidential report published for the Monterey County Workforce Investment Board containing information intended only for agency purposes.



Produced by WORKFORCE 2.0

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Recommendations	7

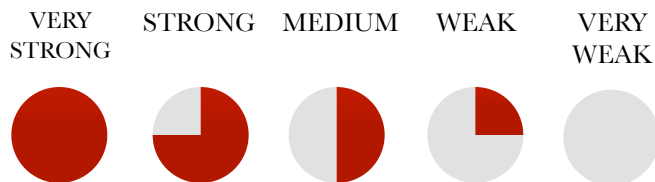
Process and Methodology

Workforce 2.0's methodology and analysis framework has been custom tailored to meet the rapidly changing needs of agencies operating under the Workforce Investment Act. Adapted from the McKinsey 7s Model, Workforce 2.0's process gathers specific information related to the "Hard" and "Soft" Elements of your agency's operations. The Hard elements include Strategy, Structure, and Systems while the Soft elements include Shared Values, Skills, Style, and Staff. Information is gathered from a combination of interviews conducted with key staff within the organization and existing data related to staff activity, current business database, current client database, placement statistics, etc. This information is then analyzed in relation to organizational development, agency processes, information management, and technology.



Workforce 2.0 is an approved provider of consulting services through California's Economic Development Department (EDD). All agency recommendations are developed with the end result of increasing efficiencies to maximize the number of participants that are placed in gainful employment through delivered services.

MONTEREY WIB & OET



Organizational Review

The organizational review looks at an agency’s vision, mission, and values and how they are translated into strategy, management and operations, staff goals and accountabilities, as well as staff training and development.



Rating 21%

STRENGTHS:

- Agency has clearly defined mission and strategy.
- Staff have specialized roles that match their backgrounds.
- Agency-wide, staff share the greater values of the organization.

AREAS OF DEVELOPMENT:

- Establishing strong structure for future business services team. Currently there is only 1 FTE in Business Services.
- Function-specific training is infrequent.
- Alignment of strategy across OET and the WIB. Implement a One-Page Strategic Plan.

Process Review

The Process review looks at an agency’s job development process by analyzing personnel, market research, prospecting, marketing and follow-up as well as looks at an agency’s case management process by analyzing personnel, candidate skills matching, candidate presentations to employers, the interview process, and the post hire on-boarding process.



Rating 35%

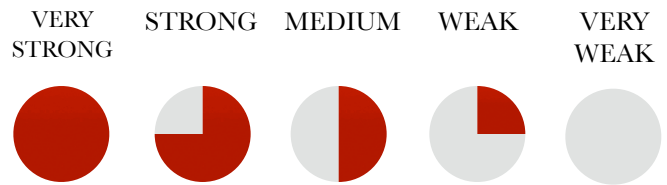
STRENGTHS:

- Candidates and their resumes are kept in a searchable database.
- Leads and Job orders are kept in a segmented database.

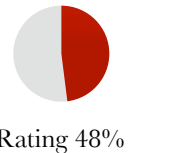
AREAS OF DEVELOPMENT:

- Marketing is not conducted.
- Recruited candidates are not screened, evaluated, or triaged based on soft skills.
- Resumes are not tailored to specific job opportunities prior to submission.
- Interviews are not scheduled are not brokered through business services and case management staff resulting in a loss of process control.
- Job offers are not brokered through business services and case management staff resulting in a loss of process control.

Information Management Review



The information management review looks at an agency's databases and analyzes how the information is organized, searched and viewed. Additionally, this section looks at the unique needs in the databases for businesses, candidates, job orders/opportunities, and participant placements.



STRENGTHS:

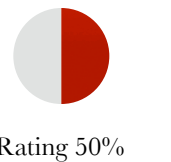
- Businesses, Job Orders and Candidates are kept in a segmented, searchable databases.
- Records of placements are kept in a searchable data base segmented by industry and location.

AREAS OF DEVELOPMENT:

- Staff activity related to business outreach calls, candidate submittals to open positions and interviews scheduling is not captured.
- Job orders leads are not captured and tracked.
- Candidate skill set information can not be easily compared to current open job orders.
- Contractors solely report placement activity using VOS, making it challenging to track and access in real-time reports on metrics.

Technology Review

The technology review looks at an agency's systems and how they are used to speed up the flow of information, allowing for better reporting that facilitates critical management decision making.



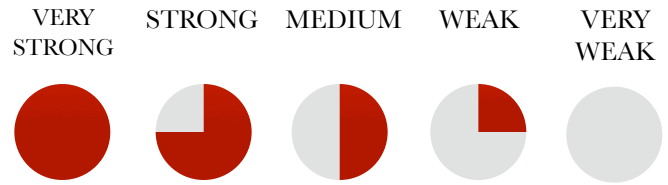
STRENGTHS:

- Reports can be accessed remotely.
- Real-time reporting is available.

AREAS OF DEVELOPMENT:

- WIB level "Dashboard" is not available to easily see activity across all centers and contractors in graphical representation.
- Management level "Dashboard" for contractors is not available to compare and track goals to actuals.
- The current system does not have automated workflow features, requiring a manual process and limiting productivity.

SHORELINE



Process Review

The Process review looks at an agency's job development process by analyzing personnel, market research, prospecting, marketing and follow-up as well as looks at an agency's case management process by analyzing personnel, candidate skills matching, candidate presentations to employers, the interview process, and the post hire on-boarding process.



Rating 44%

STRENGTHS:

- Business services reps conduct businesses outreach including cold calls.
- Marketing is conducted through email, web, and networking associations.
- Candidates and businesses are kept in searchable, segmented databases.

AREAS OF DEVELOPMENT:

- Candidates are not assessed, evaluated, or triaged based on soft skills.
- Interviews and placement process is not managed by business services or case management staff, resulting in loss of "client control" and lower placement ratios.
- Job offers are not brokered through business services and case management staff resulting in a loss of process control.

Information Management Review

The information management review looks at an agency's databases and analyzes how the information is organized, searched and viewed. Additionally, this section looks at the unique needs in the databases for businesses, candidates, job orders/opportunities, and participant placements.



Rating 61%

STRENGTHS:

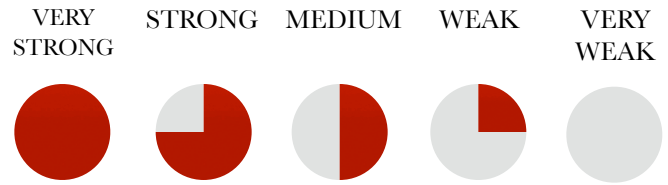
- Businesses and Candidates are kept in a segmented, searchable databases.
- Records of placements are kept in a searchable data base segmented by industry.

AREAS OF DEVELOPMENT:

- Job orders are not kept in a segmented, searchable databases.
- Business and candidate information is currently tracked in a separate system and is not entered into VOS.
- Activity information is not captured in VOS system.

TURNING POINT

Process Review



The Process review looks at an agency's job development process by analyzing personnel, market research, prospecting, marketing and follow-up as well as looks at an agency's case management process by analyzing personnel, candidate skills matching, candidate presentations to employers, the interview process, and the post hire on-boarding process.



Rating 36%

STRENGTHS:

- Business Services reps perform cold calls to businesses.
- A variety of marketing activities are conducted.
- Resumes are tailored to ensure case manager and hiring manager communication.

AREAS OF DEVELOPMENT:

- No standardized method for gathering and documenting employer hiring needs.
- Candidates are not assessed, evaluated, or triaged based on soft skills.
- Business Services and Case Management do not stay involved in screening and hiring process post interview.
- Potential improvements in Business Services outreach. We estimated less than 2% of business contacted actually hire a participant through the program.

Information Management Review

The information management review looks at an agency's databases and analyzes how the information is organized, searched and viewed. Additionally, this section looks at the unique needs in the databases for businesses, candidates, job orders/opportunities, and participant placements.



Rating 41%

STRENGTHS:

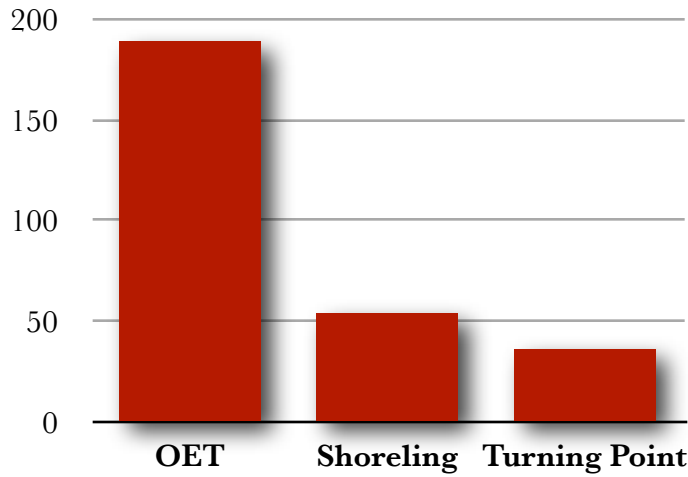
- Businesses, Candidates and Job leads are kept in searchable databases.
- Decision maker's contact info is stored with business records.

AREAS OF DEVELOPMENT:

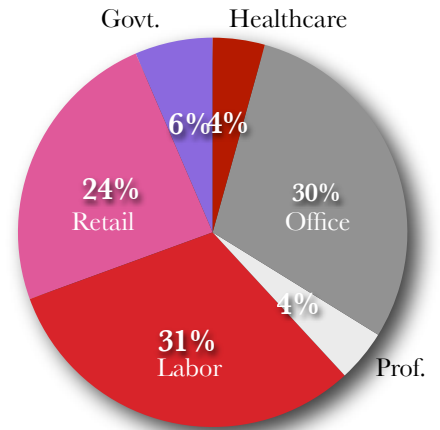
- Job Opportunities are not kept in a database.
- Segmenting options are limited.
- Candidates resumes are stored separate from records.

Supporting Data/ Sample "Dashboard"

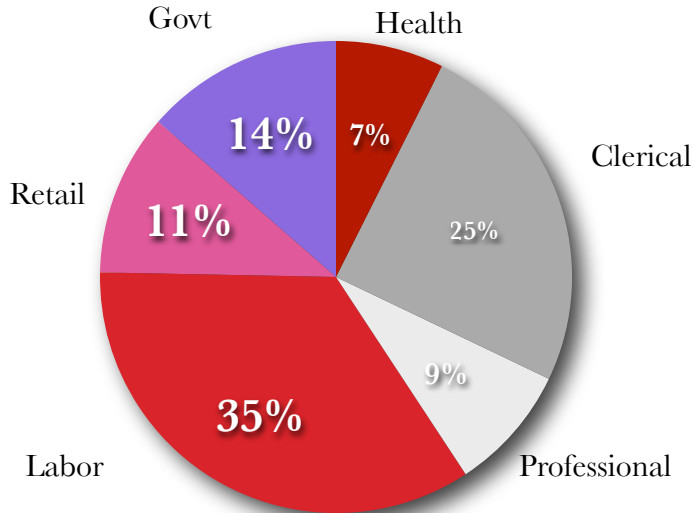
PLACEMENTS BY PROVIDER



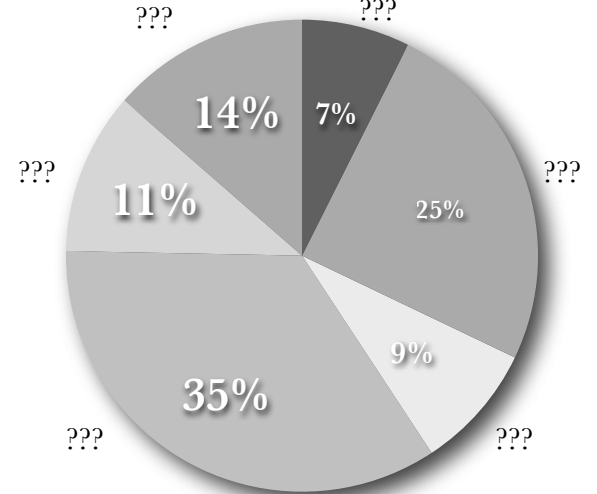
PLACEMENTS BY JOB CATEGORY



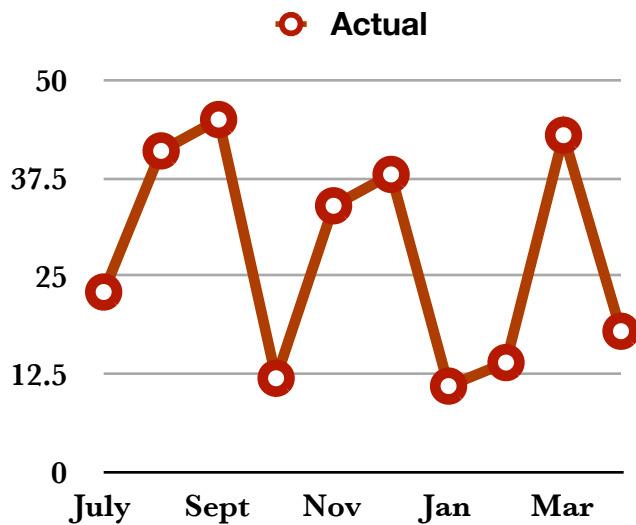
JOB ORDERS BY CATEGORY



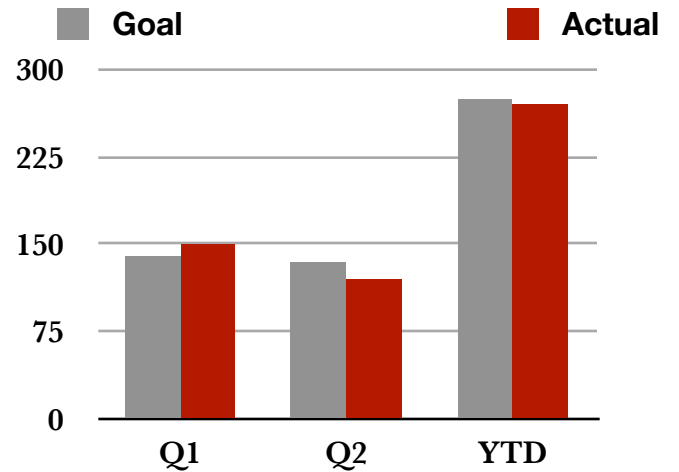
CANDIDATES BY CATEGORY (NOT AVAIL)



PLACEMENTS TRENDS



PLACEMENTS GOALS VS. ACTUALS EXAMPLE



Recommendations

Based on our thorough review of your agency, we have made the following recommendations on ways you can optimize your operations, increase job creation efforts and serve the local businesses more effectively.

1. **Develop & Implement Agency-Wide Rhythm, Metrics & Reporting System** - Work with WIB, and providers to develop a standardized reporting metric, in which global activity reports can be collected and aggregated in real-time, and reported to WIB on a minimum weekly basis, using existing technologies.
2. **Conduct OET Agency Needs Analysis** - Conduct "deeper-dive" ANA on OET to with particular focus on client intake and business services, to provide information for step # 3.
3. **Business Services Procedures Development & Training for OET** - Through our interviews we see that there is great opportunity to improve processes and placements directly facilitated by OET staff. After completing a secondary ANA for OET, we recommend the following:
 1. **OET Business Development Training** - Business Services training based on a proven staffing industry model will increasing the core staff's ability to identify, connect, and successfully partner with employers that are actively hiring, ultimately leading to an increase in number and quality job orders.
 2. **OET Job Order and Fulfillment Procedure Development and Training** - Once job orders are acquired it is essential to maintain full control of the placement process. Order fulfillment training based on a proven staffing industry model will enhancing staff's ability to accurately screen, match, present, coordinate interviews, and assist job seekers, increasing the ratio of candidates receiving interviews and job offers, ultimately leading to more placements.

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD (WIB) OVERSIGHT COMMITTEE
FROM: LOYANNE FLINN, ACTING EXECUTIVE DIRECTOR
SUBJECT: UPDATE REGARDING GRANTS
DATE: AUGUST 11, 2011

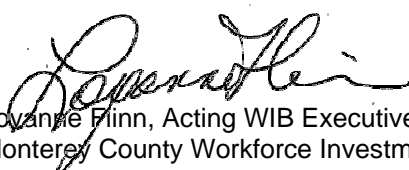
INFORMATION/DISCUSSION:

- **NEW! National Emergency Grant (NEG) Multi-Sector Re-employment Grant:**
 The U.S. Department of Labor (DOL) announced a \$45,080,077 National Emergency Grant to provide re-employment services to about 5,880 workers affected by layoffs from a number of private and public sector employers located in 20 California counties. The Monterey County Workforce Investment Board was one of 21 WIBs awarded. DOL has released 40% of the funds for this project. For Monterey County that would be \$451,200 (40%) of the \$1,128,000 total. Additional funding up to the amount approved will be made available as the grantees demonstrate a continued need for assistance. Monterey County will contract with the South Bay Workforce Investment Board, which serves 9 cities north of Los Angeles and is headquartered in Hawthorne, CA. South Bay WIB put together this comprehensive application and will hold the contract with DOL. The application was submitted in February 2011, and we are working to update the sectors to be served and the service delivery plan with the DSES Employment Services Branch Director and DSES OET Program Manager.
- **NEG-On-the-Job Training (OJT):**
 We also have the National Emergency Grant – On the Job Training project that started in August 2010 and is planned for OJTs to end in October 2011 and all performance to be met by June 2012. This project is being implemented by Shoreline (30 OJTs) and OET (13 OJTs) and the first priority is to serve long-term unemployed individuals (99 weeks or longer). We are working with the partners to catch up to the plan, complete the project on time, and meet the goals.

SNAPSHOT NEG-OJT	Project Plan	June Plan	June Actual	%
ENROLLED IN TRAINING/OJT	43	33	19	58%
RECEIVING SUPPORTIVE SERVICES	43	33	12	36%
COMPLETED OJT	41	21	2	10%
EXITS	41	21	2	10%
OJT COMPLETERS RETAINED FOR SIX MONTHS	35	3	0	0%
ENTERING EMPLOYMENT AT EXIT	41	21	2	10%
TRAINING	\$260,782	\$163,011	\$84,226	52%
SUPPORT	\$43,000	\$26,750	\$7,443	28%
TOTAL	\$334,435	\$211,482	\$99,630	47%

- **AWARDED! Hartnell Youth Career Technical Education grant.**
 Information about this training opportunity has been shared with OET, Shoreline, Turning Point and the Santa Cruz Office of Ed so they can make arrangements for Hartnell representatives to make presentations to interested prospective trainees. The project will provide 16-24 year old young adults with comprehensive training and support so they can rapidly acquire skills to secure full-time career track employment and/or succeed in additional postsecondary education programs. The project includes assessment, career coaching, basic skills development, career pathway certificates, industry-recognized certificates, tutoring and academic support, industry internships and job placement assistance. The industry sectors are green construction and agricultural industrial mechanics.
- **Monterey Adult School Pre-Apprenticeship Training:**
 Recruitment information for this program will be provided to all our workforce system partners as soon as dates and location are set. The private funds help in a designated county account for support of this program have been transferred to the Building Trades Council as the new approval and oversight organization.
- **New Start funds KickStart:**
 Monterey County received \$54,476 from a collaborative effort between the state Workforce Investment Board and the California Department of Corrections and Rehabilitation to serve parolees who have returned to Monterey County. The KickStart program offered at the Salinas One-Stop Career Center will be supported with these funds. The KickStart team offers an intensive week-long program at least monthly following the Parole And Community Team (PACT) meetings in Salinas where staff has the opportunity to partner with local parole staff and provide information to recently returned parolees.
- **Jobs and Innovation Accelerator Challenge:**
 Two proposals were submitted from our region.

 - **Project 17:**
 Project 17, a Regional Innovation Cluster (RIC), partnered with the City of Salinas, the Monterey Bay International Trade Association (MBITA) and Hartnell College for this proposal to serve the region's ag-tech businesses.
 - **Monterey County Business Council:**
 The California Central Coast Regional "Green Coast Innovation Accelerator" project includes a Trades/Union training program for Sustainable Construction that will cover five counties; training offered by Monterey Peninsula College and CSU Monterey Bay in Sustainable Hospitality; and training for Sustainable Tourism. (WIB support letter attached)


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

08/05/2011

 Date