



## WORKFORCE INVESTMENT BOARD OF VENTURA COUNTY

### EXECUTIVE COMMITTEE MEETING

Thursday, May 21, 2015  
7:30 a.m.-9:00 a.m.

#### **NOTE: EARLY START TIME**

VCCF Nonprofit Center (Community Room)  
4001 Mission Oaks Blvd., Camarillo, CA

### REVISED AGENDA

7:30 a.m.	<b>1.0 Call to Order and Agenda Review</b>	Mike Soules
7:32 a.m.	<b>2.0 Public Comments</b> Procedure: The public is welcome to comment. All comments not related to items on the agenda may be made at the beginning of the meeting only.	Mike Soules
7:35 a.m.	<b>3.0 WIB Chair Comments</b>	Mike Soules
7:40 a.m.	<b>4.0 Consent Items</b>  4.1 Approve Executive Committee Minutes: April 9, 2015 4.2 Receive and File: WIB Committee Report	Mike Soules
7:45 a.m.	<b>5.0 Finance Report</b> <ul style="list-style-type: none"><li>• PY 2014-15 Financial Status Report: March 2015</li><li>• 25% Training Expenditures</li></ul>	Theresa Salazar Vital
7:50 a.m.	<b>6.0 Performance Report</b>  6.1 2014-2015 Performance Evaluation Reporting  6.2 2014-2015 Program Updates <ul style="list-style-type: none"><li>• Adult, Dislocated Worker, and Rapid Response</li><li>• Business Services</li></ul>	Theresa Salazar Vital  Nancy Ambriz Bruce Stenslie
8:10 a.m.	<b>7.0 Action Items</b>  7.1 Recommendation that the Executive Committee of the Workforce Investment Board of Ventura County (WIB) Approve the Renewal of Contracts to Provide Comprehensive Youth Services in Amounts Not to Exceed \$475,000 for the Boys and Girls Clubs of Greater Oxnard and Port Hueneme, \$475,000 for PathPoint, and \$260,000 for Ventura Adult and Continuing Education in Program Year July 1, 2015 through June 30, 2016	Tony Skinner

	7.2 Recommendation that the Executive Committee of the Workforce Investment Board of Ventura County (WIB) Approve the Renewal of a Contract with the Economic Development Collaborative-Ventura County to Provide Business Services to the WIB in an Amount Not to Exceed \$95,000 in Program Year July 1, 2015, through June 30, 2016	Theresa Salazar Vital
	7.3 Recommendation that the Executive Committee of the Workforce Investment Board of Ventura County (WIB) Approve the Renewal of a Contract with the Agency to Provide Marketing and Public Relations Services to the WIB in an Amount Not to Exceed \$150,000 in Program Year July 1, 2015, through June 30, 2016	Brian Gabler
	7.4 Recommendation that the Workforce Investment Board of Ventura County (WIB) Approve a Workforce Innovation and Opportunity Act (WIOA) Draft Tentative Balanced Budget in Program Year July 1, 2015, through June 30, 2016	Iris Ingram
8:30 a.m.	<b>8.0 Ventura County Regional Strategic Workforce Development Plan:</b> Transition from WIA to WIOA	Cheryl Moore
8:50 a.m.	<b>9.0 WIB Administration</b>  On the Calendar:  <u>June 9, 2015</u> (Time Certain: 3:00-3:30 p.m.) WIB Study Session with the Board of Supervisors County of Ventura (Hall of Administration), Ventura, CA  <u>June 18, 2015</u> (8:00 a.m.-11:30 a.m.) WIB Annual Meeting: WIB Awards, Election of Officers, Planning Ventura County Office of Education,(Salon C), Camarillo, CA	Cheryl Moore
8:55 a.m.	<b>10.0 Committee Member Comments</b>	Committee Members
9:00 a.m.	<b>11.0 Adjournment</b>  <u>Next Meeting</u> June 25, 2015 (7:30 a.m.-9:30 a.m.) Economic Development Collaborative-Ventura County 1601 Carmen Drive, #215, Camarillo, CA	Mike Soules

Individuals who require accommodations for their disabilities (including interpreters and alternate formats) are requested to contact the Workforce Investment Board of Ventura County staff at (805) 477-5306, at least five days prior to the meeting. TTY line: 1-800-735-2922.



**WIB Executive Committee**  
**April 9, 2015**

**MINUTES**

**Meeting Attendees**

Executive Committee

Sandy Werner (Vice Chair)  
Victor Dollar  
Martel Fraser  
Brian Gabler  
Bill Pratt  
Zahid Shah

WIB Administration

Talia Barrera  
Patricia Duffy  
Richard McNeal  
Cheryl Moore  
Theresa Salazar Vital

Guests

Nancy Ambriz and Jaime Duncan  
(HSA Community Services  
Department/WIA)

**1.0 Call to Order and Agenda Review**

Sandy Werner called the meeting to order at 8:07 a.m. No changes were made to the agenda.

**2.0 Public Comments**

No public comments

**3.0 WIB (Vice) Chair Comments**

Sandy Werner deferred comments to agenda item 7.0 Perspectives from Washington D.C.

**4.0 Consent Items**

4.1 Approve Executive Committee Minutes: March 12, 2015

4.2 Receive and File: WIB Committee Reports

Motion to approve the Consent Items: Brian Gabler

Second: Bill Pratt

Motion carried unanimously

**5.0 Finance Report**

The Committee reviewed and discussed the Financial Status Report (FSR) for Fiscal Year 2014-2015, reflecting year-to-date expenditures from July 1, 2014 through February 28, 2015. The status of expenditures at 67% into the fiscal year was:

<u>WIA Core Funds</u>	<u>2014-2015 Plan</u>	<u>YTD Expended</u>	<u>% Expended vs. Plan</u>
Dislocated Worker	2,666,921	1,527,095	57%
Adult	2,064,482	1,370,010	66%
Youth	2,173,779	1,366,722	63%
Rapid Response	467,280	249,048	53%
<u>WIA Non-Core Funds</u>			
Workforce Accelerator Grant	150,003	48,259	32%

The State requires WIBs to spend a minimum of 80% of the 2014-2015 Adult, Dislocated Worker, and Youth WIA grant allocations and 100% of the 2014-2015 Rapid Response allocation by June 30, 2015. The Workforce Accelerator grant ends April 30, 2015. Another federal requirement is that at least 30% of the Youth allocation must be expended for out-of-school youth.

#### WIA Training Expenditures

As shown in the table below, the summary of WIA training expenditures, as of February 28, 2015, indicated appropriate spending against the required Adult/Dislocated Worker training expenditure targets (25% in 2012-2013 through 2015-2016; 30% in 2016-2017 and each performance year thereafter) and against WIA grants across the overlapping federal two-year grant cycles.

	Grant <u>FY 12-14</u>	Grant <u>FY 13-15</u>	Grant <u>FY 14-16</u>
Total Adult and Dislocated Worker Formula Fund Allocations	4,503,559	4,346,991	4,091,405
Training Expenditure Requirement	1,125,890 25%	1,086,748 25%	1,022,851 25%
Formula Fund Training Expenditures	921,243	786,198	247,386
Leveraged Resources			
• Total Leveraged Resources Used Toward Training Expenditures	562,187	420,156	264,750
• Maximum Allowed Leveraged Resources (10%)	450,356	434,699	409,141
Total Leveraged Resources Used Towards Training Expenditures	450,356	420,156	264,750
• Total Amount Spent on Training	1,371,599	1,206,354	512,136
• % of Training Requirement Met (Final goal = 100%)	122%	111%	50%

## **6.0 Action Items**

### **6.1 Recommendation that the Executive Committee of the Workforce Investment Board of Ventura County (WIB) Recommend Approval by the Workforce Investment Board of Ventura County (WIB) of an Updated 2014-2015 Workforce Investment Act (WIA) Budget Plan**

On April 9, 2015, the Executive Committee considered a recommendation for a second revision to the 2014-2015 WIA Budget Plan (including allocation of uncommitted funds from the Special Projects category and a requested revision of contract funding for the Economic Collaborative-Ventura County). Committee members reviewed background information, asked questions, and agreed with the recommendation that the WIB approve a revised budget plan at the WIB meeting on April 30, 2015.

Motion to approve: Brian Gabler  
Second: Bill Pratt  
Motion carried unanimously

## **6.2 Recommendation that the Executive Committee of the Workforce Investment Board of Ventura County (WIB) Approve a Revised Policy Covering Eligible Training Providers**

In 2009 the WIB, in collaboration with the then Business and Employment Services Department/WIA (the current Community Services Department/WIA), adopted a policy for the admission of suitable providers of technical and vocational education to the State of California's Eligible Training Provider List (ETPL). The guidelines for admitting such providers to the new CalJOBS system have been changed by the California Employment Development Department directives of April 2014 (WSD 13-10) and February 2015 (WSD 14-7). The WIB staff prepared revised language to bring WIB policy into conformity with the newer guidance/regulations.

Motion to approve: Zahid Shah

Second: Bill Pratt

Motion carried unanimously

## **7.0 Ventura County Regional Strategic Workforce Development Plan: Transition from WIA to WIOA**

- Perspectives from Washington, D.C.: Reporting on the National Association of Workforce Boards Forum 2015 (March 28-31, 2015) and Capitol Hill meetings, Victor Dollar and Sandy Werner shared insights and experiences from the conference and described the productive meetings that they, Vic Anselmo Kim Nilsson the WIB group had with Congressional staff. The focus was on the opportunities and challenges of WIOA implementation, the importance of retaining local control, and the need to sustain funding for WIOA, at minimum, at the current level WIA level.
- Preparing for WIOA Implementation: Executive Committee members received updates and asked questions regarding timelines, processes, new requirements, and key steps in preparing for WIOA implementation:
  - April 16, 2015: Department of Labor release of Notice of Proposed Rulemaking (NPRM) for Workforce Innovation and Opportunity Act (WIOA)
  - Date TBA: Release of State guidelines for WIOA following release of Federal guidelines
  - Date TBA: California designation of local areas, certification of local WIBs, and designation of planning regions under WIOA
  - July 1, 2015: Local Area and Local Board Implementation of WIOA

## **8.0 WIB Administration**

The Executive Committee discussed events related to WIA and to the transition to WIOA:

- Priorities for WIB Meetings: Because of the tight timing between the release of the WIOA NPRM and related documents, the Executive Committee agreed to move the WIB planning meeting from April 30, 2015, to June 18, 2015.
  - April 30, 2015 (~~Planning Meeting~~; Nominating Committee Announced)
  - June 18, 2015 (Annual Meeting; Planning Meeting; WIB Awards; Election of Officers)

- On the Calendar

April 10, 2015

WIB Award Nominations

April 30, 2015

WIB Meeting

May 12-14, 2015

CWA 2015 Regional Workforce Development Conference

June 18, 2015

WIB Annual Meeting, Planning Meeting and WIB Awards

## **9.0 Committee Member Comments**

None

## **10.0 Adjournment**

Motion to adjourn at 9:17 a.m.: Brian Gabler

Second: Zahid Shah

Motion carried unanimously

### Next Meeting

May 21, 2015 (7:30 a.m.-9:00 a.m.)

VCCF Nonprofit Center (Community Room)

4001 Mission Oaks Blvd., Camarillo, CA



**Executive Committee**  
**Workforce Investment Board of Ventura County**  
**May 21, 2015**

**WIB COMMITTEE REPORTS**

- Clean/Green Committee
- Healthcare Committee
- Manufacturing Committee
- Membership Committee
- Outreach Committee
- Resource Development
- Youth Council

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**TO: EXECUTIVE COMMITTEE**

**FROM: VICTOR DOLLAR, CHAIR  
CLEAN/GREEN COMMITTEE**

**DATE: MAY 21, 2015**

**SUBJECT: CLEAN/GREEN COMMITTEE REPORT**

The Clean/Green Committee will meet on Friday, May 22, 2015, from 8:00 a.m. to 9:30 a.m., at the VCCF Nonprofit Center, 4001 Mission Oaks Blvd., Camarillo, CA. The Clean/Green Committee report for that meeting will be provided at the Executive Committee meeting on June 25, 2015.

If you have questions or need more information, please call me at (805) 856-9500 or contact Patricia Duffy at (805) 477-5350, email [Patricia.Duffy@ventura.org](mailto:Patricia.Duffy@ventura.org)



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**TO: EXECUTIVE COMMITTEE**

**FROM: MARTEL FRASER, CHAIR  
HEALTHCARE COMMITTEE**

**DATE: MAY 21, 2015**

**SUBJECT: HEALTHCARE COMMITTEE REPORT**

The WIB Healthcare Committee met on May 8, 2015. Attending the meeting were Committee members: Martel Fraser (Chair), Greg Barnes, Ed Gonzales, Teresa Johnson, Paul Matakiewicz, Sandra Melton, Dawn Neuman, Celina Zacarias, WIB staff: Patricia Duffy and Cheryl Moore; and guests Kari Appleford (Fillmore High School), Darcy Duffy (Foothill Technology High School, Ventura Unified School District), Hilary Howard (VC Innovates), Liz Jacobson (Buena Vista Hospice and Home Health), Yvonne Jonason (Employment Training Panel), Athenia Mansour (St. John's Regional Medical Center), Subhash Karkare (Moorpark College), Nancy Knutson (Buena Vista Home Health and Hospice), Irene Ornelas (VC Innovates), Julie Pugh (Simi Valley Unified), Alisa Speidel (Simi Valley Unified), Wendy Trafton (VC Innovates), and Rigo Vargas (County of Ventura Health Care Agency, Public Health). The following is a summary of topics discussed:

## Ventura County Regional Strategic Workforce Development Plan

- Clinical Lab Science Field Experience Update

Dawn Neuman provided an update on the status of the application to the State for four local hospital laboratory certifications, as a regional consortium, to support the Clinical Laboratory Science (CLS) Field Experience Program through California State University, Channel Islands (CSUCI). Dr. Neuman shared one of the application binders to enable the Committee to see extensive work required for the final product. A fifth hospital has expressed interest in participating in the Ventura County regional consortium for the CLS Field Experience Program, which, on completion of the appropriate paperwork, will be the fifth hospital in Ventura County participating in submitting an application to the State.

Dr. Neuman commented that there are CSUCI students in the pipeline who are ready to begin when the hospital applications for certification are approved. Approximately 70% of Clinical Lab Scientists are at retirement age, which underscores the urgency of the need. The next issue of concern is finding a way to facilitate financial aid for students during their field experience—an additional year beyond the bachelor's degree that currently is not covered by standard financial aid programs.

Cheryl Moore noted the major significance of this effort, which began in 2010 when the WIB Allied Health Committee (which became the WIB Healthcare Committee) worked to close education gaps in the CLS pipeline and discovered a critical missing piece: local, post-graduate field experience required for certification. The Committee facilitated discussions and planning with the hospitals and CSUCI to create the first CLS Field Experience Program in Ventura County, and the first collaborative CLS Field Experience Program in California.

The Committee commended Dr. Neuman for her exceptional dedication and volunteer efforts in coordinating the lab certification application process, ensuring that people and paperwork were ready to submit and commit to the critical components required for certification.

- Healthcare Work Readiness Skills Chart

The Committee reviewed the most recent draft of their Healthcare Work Readiness Chart. Meeting guests from business and education were invited to participate in the discussion. Several additions were made to the document, and Committee members will finalize the revisions at their next meeting. The chart will be posted on the WIB website and provide an employer-generated healthcare work readiness reference for educators, employers, and job seekers.

- Career Pathways: Healthcare Career Ladders

*VC Innovates*, a collaborative Career Pathways Trust Grant project, invited education and business representatives to participate in this second joint meeting with the WIB Healthcare Committee. The Committee members and guests divided into three groups to review and make recommendations to the draft Healthcare Professions Career Ladder Charts developed by *VC Innovates*. The discussions generated innovative ideas and insightful recommendations on how to restructure the charts to more accurately reflect healthcare career ladders in the current business environment.

The next meeting of the WIB Healthcare Committee will be announced. If you have questions or need more information, please call me at (805) 437-8920, or contact Patricia Duffy at (805) 477-5350, e-mail [Patricia.Duffy@ventura.org](mailto:Patricia.Duffy@ventura.org).

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**TO: EXECUTIVE COMMITTEE**

**FROM: BILL PRATT, CHAIR  
MANUFACTURING COMMITTEE**

**DATE: MAY 21, 2015**

**SUBJECT: MANUFACTURING COMMITTEE REPORT**

The Manufacturing Committee met on April 8, 2015. In attendance were Committee members Bill Pratt (Chair), Tavi Udrea (Vice Chair), Vic Anselmo, Mark Fegley, Jason Miller, Marybeth Jacobsen, Subhash Karkare, Tiffany Morse, Scot Rabe and Alex Rivera; WIB staff Talia Barrera, Terri Duke and Cheryl Moore. The Committee welcomed guests Cameron Bruce (Naval Air Warfare Center Weapons Division, US Navy), Bill Cunneen (Evolving Resources, Inc.), Lisa Eckland (VC Innovates), Lisa Ellard (Evolving Resources, Inc.), Fred Garcia (Community Services Department/WIA), Hilary Howard (VC Innovates), Brad Hudson (Julia Brownley's Office), Larry McLaughlin (Deputy Sector Navigator, College of the Canyons), Tom Nielsen (Association for Unmanned Vehicle Systems International), and Celine Park (VC Innovates). Below is a summary of topics discussed:

## Ventura County Regional Strategic Workforce Development Plan

- Advanced Manufacturing Partnership for Southern California (AMP SoCal)

Jason Miller provided an update on the AMP SoCal Pillar Committees. The role of the Pillar Committees is to convene key stakeholders, examine the trends of the respective industrial ecosystem pillar, and make recommendations to the AMP SoCal Executive Council. Additionally, Pillar Committees will review the progress of AMP SoCal implementation Strategy Working Groups quarterly. Pillar Committees include (Workforce and Training, Supplier Networks, Research and Innovation, Infrastructure and Site Development, Trade and International Development, and Operations Improvement and Capital Access). Dr. Miller shared the activities and opportunities that are being discussed in the Research & Innovation Pillar Committee.

- Manufacturing Readiness Skills Curriculum Development

Scot Rabe reported progress on curriculum development at the community college level, noting that efforts also are underway for higher-level program development by the Research Center at the University of California, Irvine. Mr. Rabe described the work being done to write two courses that will incorporate hydraulics, mechatronics, pneumatics, and he commented that the colleges recognize the importance of 3D printing and quality control.

- Biomedical Device Manufacturing Certificate

Subhash Karkare announced that students may enroll at Moorpark College and/or Ventura College to take courses leading to the certificate. The first cohort of students is expected to be awarded certificates in May 2015. Committee members suggested it would be a good idea to share a list of local employers who can hire those students who receive the certificate.

- VC STEM Regional Network Grant

Cheryl Moore commented on the recent Amgen Foundation grant to support California State University, Channel Islands (CSUCI) on a new VC STEM project. Led by Phil Hampton (CSUCI) and supported by the P-20 Council as a Ventura County steering committee, this project will plan and implement Science, Technology, Engineering, and Math (STEM) regional networking to enhance K-16 education in Ventura County, with an initial focus on elementary and middle schools.

- Deputy Sector Navigator: Manufacturing Update

Larry McLaughlin announced that a new community college regional study will gather data directly from employers to determine what manufacturing jobs are in demand in different regions of the state. There will be a taskforce from industry that will be established to identify occupations and connect education and training. Larry will continue to provide updates to the committee as the project develops and might seek input from committee members.

- Career Pathways

Tiffany Morse provided an update on the regional *VC Innovates* initiative. Industry liaisons have been hired and will start connecting with businesses to provide students the opportunity to have job shadowing, internships, on-the-job-training, summer internships, and site tours. *VC Innovates* also has created a dinner series, *Entrée to Employment*, where businesses, educators, and students can discuss career opportunities in different sectors.

- Mechatronics in Ventura County

Bill Cunneen provided information to the committee regarding the importance of engineering education to the economic vitality of Ventura County. He explained the current educational posture within the three Navy Warfare Centers and the impact on other job creators in the region. With the high employer demand for engineering talent in the county, Mr. Cunneen is working with different organizations to develop youth awareness and interest in engineering courses. He emphasized the importance of training middle school and high school students in robotics and science, and engineering.

- Ventura County Regional Strategic Workforce Development Plan: Transition from WIA to WIOA

Cheryl Moore commented on the new Workforce Innovation and Opportunity Act (WIOA). WIOA will focus on aligning federal and state workforce development programs and support services with sector, regional, economic development and training and education initiatives. Among the changes when WIOA takes effect on July 1, 2015, will be a transition from the current Workforce Investment Board (WIB) to the new Workforce Development Board (WDB) designation.

The next meeting of the WIB Manufacturing Committee is scheduled for June 10, 2015, from 8:00 a.m. to 9:30 a.m., at the VCCF Nonprofit Center, 4001 Mission Oaks Blvd., Camarillo, CA.

If you have questions or need more information, please call me at (805) 384-2748, or contact Talia Barrera at (805) 477-5341, email [talía.barrera@ventura.org](mailto:talía.barrera@ventura.org).

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**TO: EXECUTIVE COMMITTEE**

**FROM: ZAHID SHAH, CHAIR  
MEMBERSHIP COMMITTEE**

**DATE: MAY 21, 2015**

**SUBJECT: MEMBERSHIP COMMITTEE REPORT**

The Committee met on May 5, 2015. In attendance were Committee members Zahid Shah (Chair), Tim Allison (Vice-Chair), Patricia Schulz and Sarah Asbury; WIB staff Talia Barrera and Cheryl Moore. The following includes topics discussed at the meeting and updated information:

## Appointments and Reappointments

- Reappointments: The Committee reviewed attendance records and WIB engagement for current WIB members whose terms would end between July and September 2015. Those determined to be in good standing and eligible for reappointment will receive letters to ascertain their interest in reappointment. Interested candidates will be asked to update their resumes before being considered for nomination for reappointment to a three-year term by the Board of Supervisors.
- Appointments: Committee members discussed the recruitment of potential candidates for future appointment nominations. Participation on sector committees continues to provide a good introduction to the work of the WIB prior to consideration of a possible recommendation for WIB appointment.

## Action Item

The Committee approved a recommendation that the Workforce Investment Board of Ventura County (WIB) approve the appointment of one new member to the WIB Youth Council: Celine Park, Ventura County Community College District.

## Ventura County Regional Strategic Workforce Development Plan

Committee members received an update on the status of the reauthorization of the Workforce Innovation and Opportunity Act (WIOA). Regarding the requirements for the size and composition of the new, local Workforce Development Boards, the Committee began a discussion on how the federal requirements could affect the Ventura County WIB composition. (Additional State requirements had not been announced.) Discussion will continue at the next meeting.

The next Membership Committee meeting is scheduled for July 7, 2015, from 8:30 a.m. to 10:00 a.m., at the VCCF Nonprofit Center, 4001 Mission Oaks Blvd., Camarillo, CA.

If you have questions or need more information, please call me at (805) 207-3957, or contact Talia Barrera at (805) 477-5341, email [talia.barrera@ventura.org](mailto:talia.barrera@ventura.org).

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**TO: EXECUTIVE COMMITTEE**

**FROM: BRIAN GABLER, CHAIR  
OUTREACH COMMITTEE**

**DATE: MAY 21, 2015**

**SUBJECT: OUTREACH COMMITTEE REPORT**

The Outreach Committee met on Wednesday, May 20, 2015, from 8:00 a.m. to 9:30 a.m., at the Economic Development Collaborative of Ventura County (EDC-VC), Camarillo. The Outreach Committee report for that meeting will be provided at the Workforce Investment Board meeting on June 18, 2015.

If you have questions or need more information, please call me at (805) 583-6701, or contact Talia Barrera at (805) 477-5341, email [Talia.Barrera@ventura.org](mailto:Talia.Barrera@ventura.org)



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**TO: EXECUTIVE COMMITTEE**

**FROM: IRIS INGRAM, CHAIR  
RESOURCE DEVELOPMENT COMMITTEE**

**DATE: MAY 21, 2015**

**SUBJECT: RESOURCE DEVELOPMENT COMMITTEE REPORT**

The WIB Resource Development Committee met on May 13, 2015. Attending the meeting were Committee members: Iris Ingram (Chair), Gerhard Apfelthaler (Vice Chair), and Victor Dollar; and WIB staff Richard McNeal, Cheryl Moore and Theresa Salazar Vital. The following is a summary of topics discussed:

## Grant Report

Richard McNeal provided an update on grant proposals in progress, grants in progress, letters of support/commitment, and other grant commitments. Of particular interest to the Committee were four recent federal and state applications, initiated by the Human Services Agency/Community Service Department with other County of Ventura agencies and the WIB as partners. The proposals were to extend and/or augment the current STEPS program, which receives partial funding through the WIB's Workforce Innovation Fund Grant from the California Workforce Investment Board.

Committee members asked questions regarding the process by which grant applications are vetted/approved by the WIB and how proposed grants include funding for WIB deliverables and staffing. Concerned that the WIB could find itself committed to unfunded and/or unknown responsibilities and risks, the Committee directed the staff to develop a WIB policy. The policy would stipulate that all grant proposals involving WIB and/or WIB staff commitment of time and/or resources be reviewed, in their final form, by the Executive Committee for approval prior to submission. Simple letters of support would not need such approval.

## Action Item

**Approved a Recommendation that the Executive Committee Recommend that the Workforce Investment Board of Ventura County (WIB) Approve a Workforce Innovation and Opportunity Act (WIOA) Draft Tentative Balanced Budget for Program Year 2015-2016**

Theresa Salazar Vital noted that the Workforce Investment Act (Act) and WIB Bylaws require that the local board develop a budget for the purpose of carrying out the duties and priorities of the local board, subject to the approval of the Board of Supervisors. Each Program Year (PY), the WIB reviews and approves a preliminary budget, identifying revenues and planned expenditures for the administration of employment and training programs in Ventura County. As necessary information is known (e.g., funding allocations, prior year carry-in funds), the preliminary approved budget is updated by the WIB to reflect current program needs and recommend new programs/services with available uncommitted funds.

For PY 2015-2016, the annual WIB budget process is unique in that July 1, 2015, is the implementation date for the Workforce Innovation and Opportunity Act (WIOA) and requires continuing transition activities from WIA to WIOA. As of the Resource Development Committee meeting date, Federal WIOA regulations were not finalized, the State had not issued their local area WIOA mandates, and WIOA Adult, Dislocated Worker, Youth and Rapid Response local area allocations were pending. Because of these reasons and the necessity of having an approved budget with which to begin the fiscal year, WIB staff recommended approval of a draft preliminary budget plan to commence expenditures, noting that budget updates will occur on the basis of new information.

Committee members reviewed a working draft of a preliminary WIOA budget plan for 2015-2016 which reflected positive or negative balances in the funding categories. Following a thorough discussion, the Committee approved the proposed action to recommend a preliminary budget to the Executive Committee and to the WIB—with the stipulation that the budget be balanced and titled “tentative balanced budget” before submission for approval.

#### Ventura County Regional Strategic Workforce Development Plan: Transition from WIA to WIOA

- WIOA One-Stop Operator: Cheryl Moore described the WIOA requirement for procuring the One-Stop Operator and the opportunity for requesting a waiver. The Committee asked about the procurement process, emphasized the importance of neutrality and transparency in decision making, and requested to see (1) the list of services that a bidder would be expected to provide and (2) an itemized list of the prospective cost of those services.
- Innovation Ecosystem Work Group: The Committee agreed to include this new initiative in the work of the Resource Development Committee because of its regional approach to developing strategies, action plans, and partnerships. Gerhard Apfelthaler and Jesus Torres are co-chairs of the work group.

The date for the next meeting of the Resource Development Committee will be announced. If you have questions or need more information, please call me at (805) 378-1412, or contact Richard McNeal at (805) 477-5344, email [richard.mcneal@ventura.org](mailto:richard.mcneal@ventura.org).



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**TO: EXECUTIVE COMMITTEE**

**FROM: TONY SKINNER, CHAIR  
YOUTH COUNCIL**

**DATE: MAY 21, 2015**

**SUBJECT: YOUTH COUNCIL REPORT**

The WIB Youth Council met on May 6, 2015. Attending the meeting were Council members: Tony Skinner (Chair), Jesus Torres (Vice Chair), Jerry Beckerman, Sean Bhardwaj, Mary Benton, Sandra Carrillo, Linda Fisher-Helton, Juan Mercado and Archie Scott; WIB staff Patricia Duffy, Richard McNeal and Cheryl Moore; and guests Jeffrey Albaugh, Karen Bluffer, Mariana Cazares, Celine Park, Vivian Pettit, Steve Thompson, Kim Whitaker and Omar Zapata. The following is a summary of topics discussed:

## Public Comments

Karen Bluffer briefly described the five-week spring 2015 youth outreach initiative of the WIB Outreach Committee. An added dimension to the social media strategy is the use of Twitter to connect with teenagers and young adults and encourage them to visit the WIB's VC Jobs with a Future youth website: [www.vcjobswithafuture.com](http://www.vcjobswithafuture.com).

## Ventura County Regional Strategic Workforce Development Plan: Youth Referral Work Group Update

The work group continued to explore and consider different options prior to the development of a youth referral system. Considerations under discussion included:

- Housing Authorities and Non-Profits: Linda Fisher-Helton reported that five area housing authorities and other interested non-profits had agreed to meet at the VCCF Nonprofit Center in early June 2015 to discuss opportunities and challenges in collaborating on youth referrals. Youth Council members expressed their appreciation for this important first step.
- CDBG Resources: Ms. Fisher-Helton offered to compile a list of Community Development Block Grant (CDBG) recipients in Ventura County as a resource for WIA youth contractors.
- 211 Referrals: Ms. Fisher-Helton announced that 211 is scheduled to give a presentation on their database and referral process at the Youth Council meeting on June 3, 2015.
- Probation Department: Sandra Carrillo indicated that the Probation Department holds regular meetings with field officers who would be valuable partners in the youth referral process.

## Youth Contracts for 2015-2016

- 2014-2015 Youth Program Provider Performance: Richard McNeal reviewed third-quarter Workforce Investment Act (WIA) youth program provider performance, distributing the

summary performance measures chart for the period ending March 31, 2015. He noted that all Common Measures outcomes had been exceeded and that enrollments were on track.

- 2015-2016 Youth Program Provider Contracts: Mr. McNeal discussed the issuance of youth contracts for 2015-2016, the third set of contracts resulting from the most recent RFP. The objective is to have the three contracts approved in June 2015 by the Board of Supervisors so that services will continue without interruption from July 1, 2015.

The Workforce Innovation and Opportunity Act (WIOA) presents two major issues that the new contracts will have to address: 75% of the total youth allotment must be spent on out-of-school youth; and 20% of the same allotment must be spent on work experience. Attaining these spending goals will require that all new enrollments be out-of-school youth and that the youth providers spend a full 25% of their individual budgets on work experience. At a previous meeting of WIB staff and the contractors, the consensus was that, though challenging, these goals were not unreachable and that the new contracts could include these figures together with needed reductions in the numbers of new enrollees.

#### Action Items

- **Approved a Recommendation that the Executive Committee Recommend that the Workforce Investment Board of Ventura County (WIB) Approve the Continuation of Youth Contracts under the Workforce Innovation and Opportunity Act (WIOA) for Program Year 2015-2016**

Lengthy discussion of the issues surrounding the 75% and the 20% WIOA youth requirements produced a Youth Council consensus that the current contractors, because of their excellent performance, should be recommended for continuation of the final year of their of their current contracts in 2015-2016, in accordance with their previous agreements and with initial budgets set at the same levels as the 2014-2015 initial WIB WIA budget amounts. The WIB staff will arrange for any subsequent needed modification of the budgets or the other contract documents at the appropriate time.

- **Approved a Recommendation that the Workforce Investment Board of Ventura County (WIB) Consider Inclusion of a Youth Committee under the New Workforce Innovation and Opportunity Act (WIOA) Workforce Development Board Structure**

The Council agreed to formalize the consensus of the discussion at the April 2015 Youth Council meeting: that a youth committee, whatever its future formal structure, should continue in existence under WIOA and should revise its membership to include representatives of those civic and demographic groups devoted to solving the various barriers faced particularly by older youth.

There was particular concern for disconnected youth and parents, both of which groups should be represented. The possibility of having “rotating” or “visiting” representatives was raised. Council members and WIA youth providers will undertake recruitment efforts for both older youth and for parents. In view of the difficulties of recruiting members unfamiliar with the WIA and with the business of the Youth Council, it was suggested that some type of Youth Council mentoring process might be helpful in orienting new members and retaining them.

Claudia Harrison emphasized the importance of building a sense of empowerment and leadership among parents. First 5 offers that type of training, and membership on the Youth Council might be a good platform for engagement.

### Council Member Comments

Sean Bhardhwaj described the recent successful entrepreneurship competition under the auspices of Aspire3 and California State University, Channel Islands (CSUCI). More than 200 were in attendance, including students from middle school, high school, and college levels. Educators and local businesses also provided support. Council members expressed their appreciation for the program.

If you have questions or need additional information, please call me at (805) 642-2149, or contact Richard McNeal at (805) 477-5344, email [richard.mcneal@ventura.org](mailto:richard.mcneal@ventura.org).

The next meeting of the Youth Council is scheduled for June 3, 2015 (3:00-4:30 p.m.), at the VCCF Nonprofit Center (Board Room), 4001 Mission Oaks Blvd., Camarillo, CA.

# **BUILDING OUR FUTURE WORKFORCE**

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WORKFORCE INVESTMENT BOARD  
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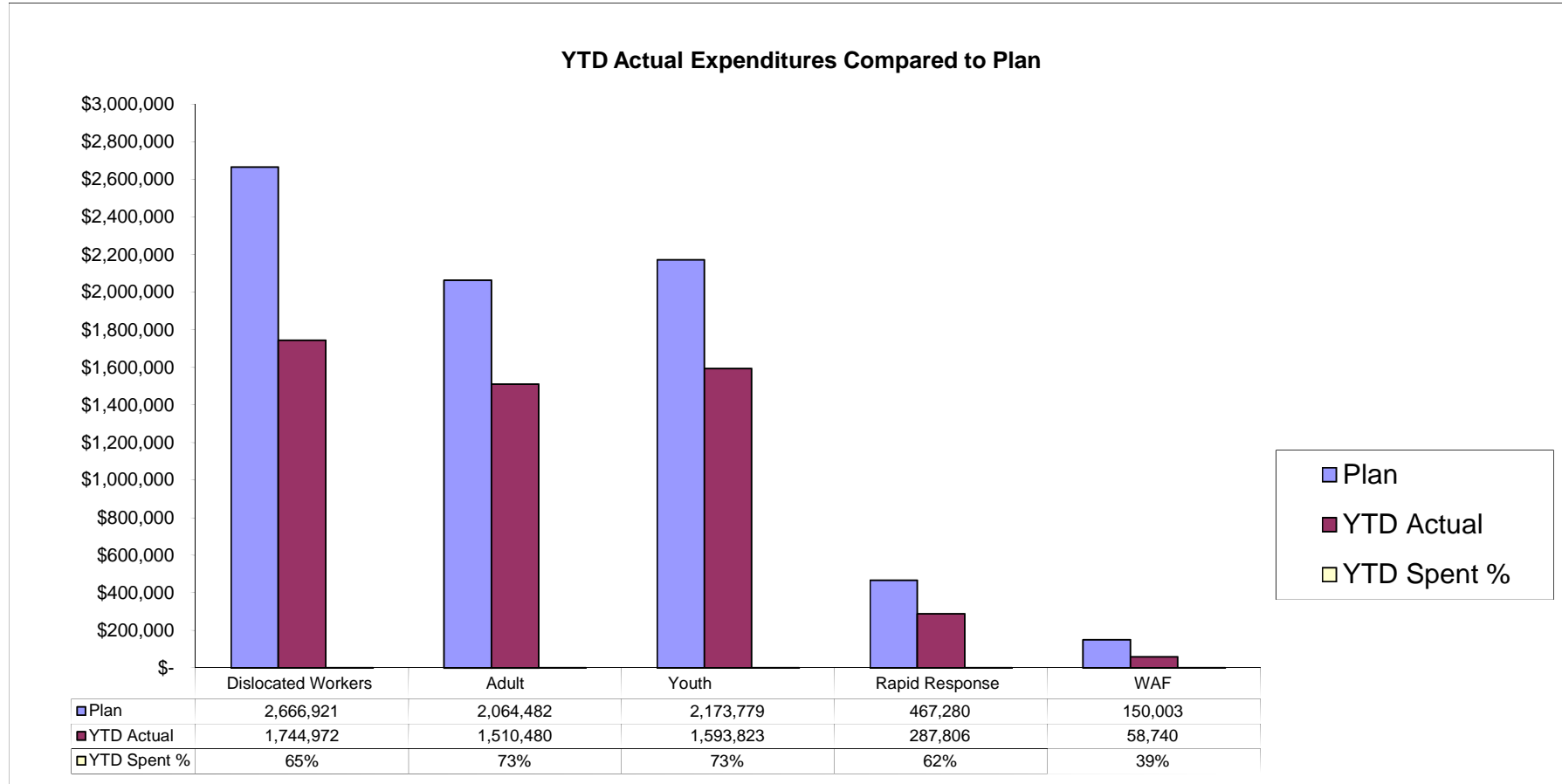


## **FINANCIAL STATUS REPORT for FISCAL YEAR 2014-2015**

**Year to Date Expenditures from 07/01/14 to 03/31/2015 (75% into the Fiscal Year)**

***Submitted on: April 27, 2015***

**WIA Financial Status Report for Fiscal Year 2014 - 2015**  
**Year to Date Expenditures from 07/01/14 to 03/31/2015 (75% into the Fiscal Year)**



WIA Financial Status Report for Fiscal Year 2014 - 2015												
Year to Date Expenditures from 07/01/14 to 03/31/2015 (75% into the Fiscal Year)												
Name of Grants	Salaries and Benefits			Direct Program/WIB Special Projects			Other Operating Expenses			Total		
	Plan	YTD Actual	%	Plan	YTD Actual	%	Plan	YTD Actual	%	Plan *	YTD Actual	Plan Balance
<b>Core Grants:</b>												
Dislocated Worker	1,452,002	1,001,289	69%	926,619	520,538	56%	288,299	223,145	77%	2,666,921	1,744,972	921,948
Adult	1,187,945	880,276	74%	653,251	452,910	69%	223,286	177,294	79%	2,064,482	1,510,480	554,002
Youth	482,209	382,949	79%	1,456,463	1,039,694	71%	235,107	171,180	73%	2,173,779	1,593,823	579,956
Rapid Response	245,610	183,485	75%	174,743	73,753	42%	46,927	30,568	65%	467,280	287,806	179,474
<b>Others:</b>												
WAF	6,350	5,899	93%	93,517	43,670	47%	50,136	9,170	18%	150,003	58,740	91,263
<b>Total WIA Grants</b>	<b>\$ 3,374,116</b>	<b>\$ 2,453,899</b>	<b>73%</b>	<b>\$ 3,304,593</b>	<b>\$ 2,130,565</b>	<b>64%</b>	<b>\$ 843,755</b>	<b>\$ 611,357</b>	<b>72%</b>	<b>\$ 7,522,464</b>	<b>\$ 5,195,821</b>	<b>\$ 2,326,643</b>

Submitted on: April 27, 2015

<b>VCFMS Plus Estimated Accrued Expense for Fiscal Year 2013- 2014</b> <b>Year to Date Expenditures from 07/01/14 to 03/31/2015 (75% into the Fiscal Year)</b>												
	Salaries and Benefits			Direct Program/Client Expenses			Other Operating Expenses			Total		
	Paid	Accrued	YTD Total	Paid	Accrued	YTD Total	Paid	Accrued	YTD Total	Paid	Accrued	YTD Total
<b>CORE GRANTS:</b>												
Dislocated Worker	939,165	62,124	1,001,289	438,569	81,969	520,538	212,310	10,835	223,145	1,590,045	154,928	1,744,972
Adult	825,661	54,616	880,276	392,109	60,801	452,910	168,685	8,609	177,294	1,386,455	124,025	1,510,480
Youth	359,189	23,760	382,949	901,199	138,495	1,039,694	162,868	8,312	171,180	1,423,257	170,567	1,593,823
Rapid Response	172,101	11,384	183,485	10,310	63,442	73,753	29,084	1,484	30,568	211,495	76,311	287,806
<b>OTHERS:</b>												
WAF	5,533	366	5,899	25,556	18,114	43,670	8,725	445	9,170	39,814	18,925	58,740
										-	-	-
<b>Total WIA Grants</b>	<b>\$ 2,301,650</b>	<b>\$ 152,249</b>	<b>\$ 2,453,899</b>	<b>\$ 1,767,743</b>	<b>\$ 362,822</b>	<b>\$ 2,130,565</b>	<b>\$ 581,672</b>	<b>\$ 29,685</b>	<b>\$ 41,930</b>	<b>\$ 4,651,065</b>	<b>\$ 544,756</b>	<b>\$ 5,195,821</b>

### WIA Training Activity Summary (Expended and Leveraged)

(based on annual report "Summary of Leveraged Resources - Attachment 6 - page 35 of WSD12-3)

Year to Date Expenditures from 07/01/14 to 03/31/2015 (75% into the Fiscal Year)

Rpt Line #	Program Year Funding and Traing Expenditures	FY 12-14 Grant Due 10/01/14	FY 13-15 Grants Due 10/01/15	14-16 Grants (Due 10/1/16)
4)	Adult and Dislocated Worker Formula Fund Allocations	4,503,559	4,346,991	4,092,349
5)	Training Expenditures Required	1,125,890	1,086,748	1,023,087
	<i>Training Expenditures % Required</i>	<i>25%</i>	<i>25%</i>	<i>25%</i>
6)	Formula Fund Training Expenditures	921,243	786,198	258,362
	Leveraged Resources			
	- Total Leveraged Resources	562,187	420,156	249,016
	- Maximum Allowed Leveraged Resources (10%)	450,356	434,699	409,235
7)	- Total Leveraged Resources Used Towards Training Expenditures	450,356	420,156	249,016
8)	Total Amount Spent On Training (should equal/exceed Line 5)	1,371,599	1,206,354	507,378
	% of Training Requirement Met (final goal is 100%)	<b>122%</b>	<b>111%</b>	<b>50%</b>

9)	<b>Leveraged Resources Detail (notes)</b>			
	(a) Pell Grant	116,771	233,994	70,760
	(b) Programs Authorized by the Workforce Investment Act (VETP)	200,457	0	0
	(c) Trade Adjustment Assistance (EDD)	129,548	20,130	0
	(e) Match Fund from Employers, and Industry Associations (OJT 50%)	115,411	166,031	178,256
	<b>Total</b>	<b>562,187</b>	<b>420,156</b>	<b>249,016</b>
	<b>Legends/Coding for Source/Type of Leveraged Resources:</b> 9a) = Pell Grant 9b) = Programs Authorized by the Workforce Investment Act (specify) 9c) = Trade Adjustment Assistance 9d) = Dept of Labor National Emergency Grants 9e) = Match funds from employers, industry, and industry associates (specify) 9f) = Match funds from joint labor-management trusts (specify) 9g) = Employment Training Panel grants			

#### NOTES:

Early in the year, the "% of Training Requirement Met..." shown above may appear to "understate" the degree to which the organization is actually accomplishing its planned training goals (i.e. the organization is likely doing better than it looks here). This is because the training expenditures shown in this report do NOT include costs related to two areas of current year training activities that are in the current year Plan:

- 1) Current year training activities (in current year Plan) that have been paid with prior year grant funds
- 2) Current year training activities (in current year Plan) that have been committed to but not yet paid



FY 2014-15 WIA Budget Plan (Approved on 6/12/14, Update on 10/23/14, and Update on 4/30/15)							
							Year to Date Expenditures from 07/01/14 to 03/31/2015 (75% into the Fiscal Year)
		Dislocated Worker	Adult	Youth	Rapid Response	WAF Project	FY 14-15 Plan w/Rollover
Revenue Projection:							
1	FY14-15 Grants (WSIN13-70 and WSIN 14-33)	2,262,662	1,829,687	1,995,263	396,711	150,000	6,634,323
2	FY14-15 Mgmt Reserve:DW 8.5%,Adult 6.5%,Youth 6.5%	(190,783)	(119,540)	(130,062)			(440,385)
3	Balance rolled over from prior year grants:						-
4	FY13-14 Mgt Reserve	94,399	85,418	154,870			334,687
5	Additional balances from FY12-13 and prior	31,147	26,429	97,912	37,161	-	192,649
6	Additional rollover - Salaries Savings/(Overage)	277,500	5,300	10,300	400	-	293,500
7	Overhead Saving/(Overage)	-	15,967				15,967
8	FY13-14 EDC-VC Business Srvs				10,000	-	10,000
9	FY 13-14 Unspent Contracts/Misc	92,000	71,230	45,500	23,000	-	231,730
10	ITA/OJT Committed in FY13-14 spent in FY14-15	100,000	150,000				250,000
11	Total Available Grants to to be Spent	2,666,925	2,064,491	2,173,783	467,272	150,000	7,522,471
12	Grants %	35.5%	27.4%	28.9%	6.2%	2.0%	100.0%
13	CSD FTEs Assigned to the programs	12.30	10.20	2.60	1.90		27.00
14	% Direct FTES Allocated to Grants	45.6%	37.8%	9.6%	7.0%	0.0%	100.0%
15	% Admin Staff Allocated to Grants	35.7%	27.8%	27.8%	8.0%	0.7%	100.0%
16	Expenditure Projection:						-
17	Salaries and Benefits:						-
18	CSD 2,508,000	1,142,533	947,247	241,511	176,709	-	2,508,000
19	WIB Administration (\$866,116) 866,116	309,469	240,698	240,698	68,901	6,350	866,116
20	Subtotal Salaries and Benefits	1,452,002	1,187,945	482,209	245,610	6,350	3,374,116
21	Direct Expenses:						-
22	Grant Specific Contracts						-
23	EDC-VC Business Services 13-14 Extension						-
24	EDC-VC Business Services				95,000	-	95,000
25	Boys and Girls Club: Core Program			523,300			523,300
26	Pathpoint: Core Program			523,300			523,300
27	VACE Core Program			308,300			308,300
28	Cost/benef analysis (ROI) emsi 3/13 repo	-					-
29	Special Projects					-	-
30	Subtotal - Contracted Program Expense	-	-	1,354,900	95,000		1,449,900
31	Client Expenses:						-
32	ITA / OJT (25% required - 10% leverage)	653,483	389,602				1,043,085
33	ITA / OJT Committed in 13-14 to be spent in 14-15	100,000	150,000				250,000
34	Others/ChildCare/Trans - JTA	84,307	77,821	-			162,128
35	Universal Clients (now charged in oh/admin)	-	-	-			-
36	Subtotal - Client Expense	837,790	617,423	-	-	-	1,455,213
37	Other Allocated/Contracted Expenses						0%
38	Geographic Solutions 24,828	-	-	-	-	24,828	24,828
39	WAF Grant Facilitator 58,616					58,616	58,616
40	Outrch/Mktg: theAgency 200,000	47,000	12,500	77,000	63,500	-	200,000
41	Outreach -WIB 30,000	11,234	8,233	8,669	1,864	-	30,000
42	WIB Expense - Non Staff 20,000	7,489	5,489	5,779	1,242	-	20,000
43	Program Outreach-CSD (\$40,073) 30,000	11,234	8,233	8,669	1,864	10,073	40,073
44	Kiosk 5,000	1,872	1,372	1,445	311	-	5,000
45	VCWIB Regional Labor Market Reports 20,963	10,000			10,963		20,963
46	Subtotal - other allocated expense 389,407	88,830	35,828	101,563	79,743	93,517	399,480
47	Subtotal- Program/Clients Expenses	926,619	653,251	1,456,463	174,743	93,517	3,304,593
48	Total Direct Program Expense	2,378,622	1,841,196	1,938,672	420,353	99,867	6,678,709
49	Overhead/Administration:	36%	28%	29%	5.79%	2.00%	100.00%
50	Communication/Voice/data 75,000	26,711	20,676	21,771	4,345	1,496	75,000
51	Insurance 19,725	7,025	5,438	5,726	1,143	394	19,725
52	Facilities Maint. 89,000	31,697	24,536	25,835	5,157	1,776	89,000
53	Membership and dues 12,000	4,274	3,308	3,483	695	239	12,000
54	Education allowance 5,000	1,781	1,378	1,451	290	100	5,000
55	Indirect cost recovery(County A87) 6,917	2,463	1,907	2,008	401	138	6,917
56	Books and Publication 3,000	1,068	827	871	174	60	3,000
57	Office Equip./Supp. & Furniture/Fixtures<5000 (\$44,020) 26,000	9,260	7,168	7,547	1,506	18,539	44,020
58	Mail Center - ISF 5,000	1,781	1,378	1,451	290	100	5,000
59	Purchase Charges - ISF 4,000	1,425	1,103	1,161	232	80	4,000
60	Copy Machine - ISF 15,000	5,342	4,135	4,354	869	299	15,000
61	Stores - ISF 300	107	83	87	17	6	300
62	Information Tech - ISF 5,000	1,781	1,378	1,451	290	100	5,000
63	Computer Services Non ISF 25,000	8,904	6,892	7,257	1,448	499	25,000
64	Building Lease/Rental 85,000	30,273	23,433	24,673	4,925	1,696	85,000
65	Storage Charges - ISF 5,000	1,781	1,378	1,451	290	100	5,000
66	Mileage Reimb. - Staffs only (\$30,000) 25,000	8,904	6,892	7,257	1,448	5,499	30,000
67	Conference/Seminars:Staffs (\$23,000) 15,000	5,342	4,135	4,354	869	8,299	23,000
68	Conference and Seminars - WIB Staffs 20,000	7,123	5,514	5,806	1,159	399	20,000
69	Misc. Travel - Staffs only 15,000	5,342	4,135	4,354	869	299	15,000
70	Fiscal/HR/BTD/ET (HSA) 350,000	124,490	96,488	101,597	20,279	7,146	350,000
71	Other Admin Services (\$6,793) 4,000	1,425	1,103	1,161	232	2,873	6,793
72	Subtotal Overhead 809,942	288,299	223,286	235,107	46,927	50,136	843,755
73		-	-	-	-	-	-
74	Planned Total Grant Expenses	2,666,921	2,064,482	2,173,779	467,280	150,003	7,522,464
75	Admin Rate for State Reporting	7%	7%	7%	7%	6%	7%
76	Admin Rate (State Reported + Other)	11%	11%	11%	10%	33%	11%
77		5	9	4	(8)	(3)	7

*Workforce Investment Board (WIB) of Ventura County - WIA Performance Report Program*  
Year 2014 – 2015: Third Quarter (Q3) July 1, 2014 to March 31, 2015

## TOTALS FOR VENTURA COUNTY

ALL PROVIDERS	Adult Enrollments	Dislocated Worker Enrollments	Youth Enrollments	Total Enrollments	Core Self Service (Universal Customers)
	224	266	329	819	14,470

### Community Services Department (CSD)

Enrollments	Plan New Unique	Actual New Unique	Plan to Actual	Total Q3 Enrollments (with Training)	Total Enrollments (with Training) through 5/18/15
<b>Adult</b>	83	134	161%	224 (108)	230 (121)
<b>Dislocated (DW) Workers</b>	120	148	123%	266 (180)	283 (199)

## COMMON MEASURES OUTCOMES

	ENTERED EMPLOYMENT				EMPLOYMENT RETENTION				AVERAGE EARNINGS			
	Goal	Actual	Success Rate	Clients	Goal	Actual	Success Rate	Clients	Goal	Actual	Success Rate	Earnings & Clients
<b>ADULT</b>												
<b>VC WIB</b>	73.5	89.84	122.2%	115/128	83.5	89.60	107.3%	112/125	\$14,000	\$16,561	118.2%	\$1,589,924/96
<b>CSD</b>	73.5	89.84	122.2%	115/128	83.5	89.43	107.1%	110/123	\$14,000	\$16,735	119.5%	\$1,589,836/95

	ENTERED EMPLOYMENT				EMPLOYMENT RETENTION				AVERAGE EARNINGS			
	Goal	Actual	Success Rate	Clients	Goal	Actual	Success Rate	Clients	Goal	Actual	Success Rate	Earnings & Clients
<b>DW</b>												
<b>VC WIB</b>	76.5	89.47	116.9%	68/76	84.00	87.05	103.6%	74/85	\$15,750	\$23,599	149.8%	\$1,675,591/71
<b>CSD</b>	76.5	89.47	116.9%	68/76	84.00	87.05	103.6%	74/85	\$15,750	\$23,599	149.8%	\$1,675,591/71

	EMPLOYMENT OR EDUCATION PLACEMENT				DEGREE OR CERTIFICATE ATTAINMENT				LITERACY AND NUMERACY GAIN			
	Goal	Actual	Success Rate	Clients	Goal	Actual	Success Rate	Clients	Goal	Actual	Success Rate	Earnings & Clients
<b>YOUTH</b>												
<b>VC WIB</b>	68.0%	79.74	117.2%	189/237	58.0%	68.32	117.7%	151/221	58.0%	78.57	135.4%	88/112
<b>BGC</b>	68.0%	81.06	119.2%	107/132	58.0%	75.20	129.6%	91/121	58.0%	91.66	158.0%	44/48
<b>PPT</b>	68.0%	74.32	109.2%	55/74	58.0%	63.37	109.2%	44/69	58.0%	76.92	132.6%	20/26
<b>VACE</b>	68.0%	87.09	128.0%	27/31	58.0%	51.61	88.9%	16/31	58.0%	63.15	108.8%	24/38

VC WIB: Ventura County Workforce Investment Board

Goal: LWIA Final Performance Goals for PY 2014-2015 (WSD 14-6, December 23, 2014)

Success Rate: Actual performance divided by goal. Less than 80% at end of program year = failed performance

Clients: Numerator = Only clients with a positive outcome. Denominator = All clients included in the outcome

- Entered Employment, Employment/Education Placement & Degree/Certificate Attainment: Clients leaving the program between October 1, 2013 and September 30, 2014

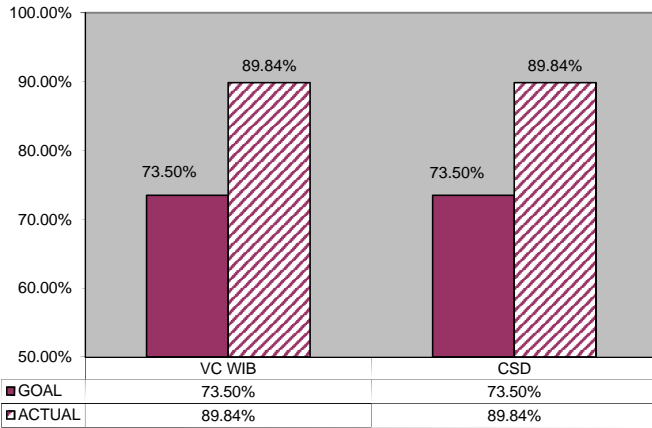
- Average Earnings & Retention: Clients leaving the program between April 1, 2013 and March 31, 2014

- Literacy and Numeracy: Clients in the program between July 1, 2014 and June 30, 2015

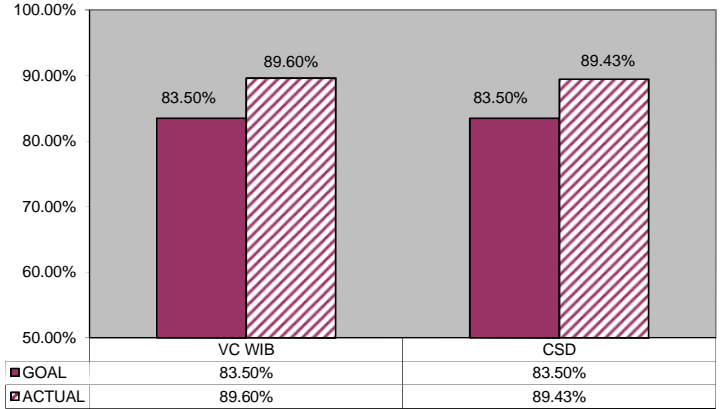
**WIA Performance Report - Common Measures Outcomes**  
**PY 2014-2015: Third Quarter (Q3) July 1, 2014 to March 31, 2015**

## Adult

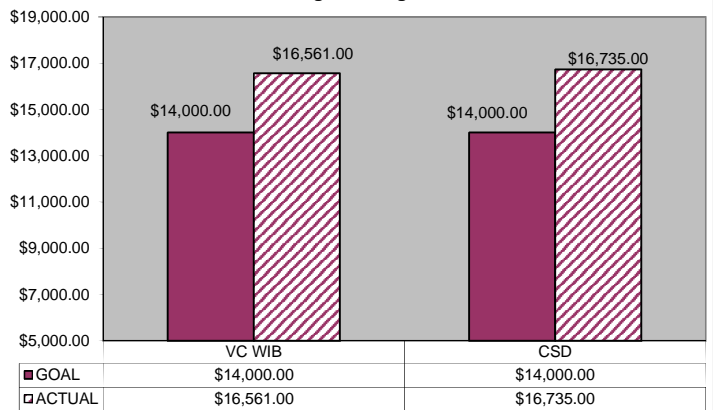
**Entered Employment Rate**



**Employment Retention Rate**

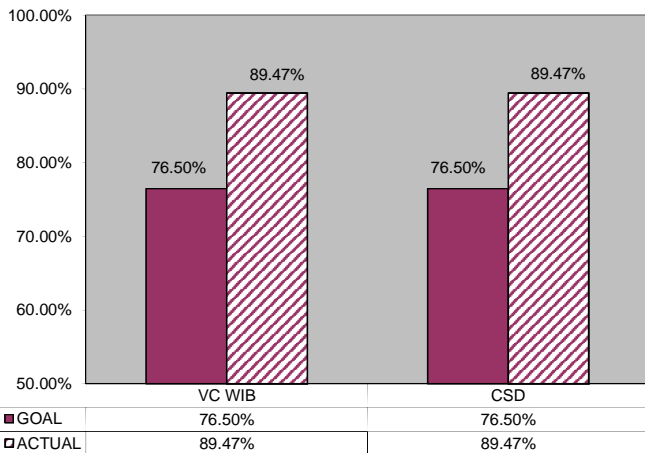


**Average Earnings**

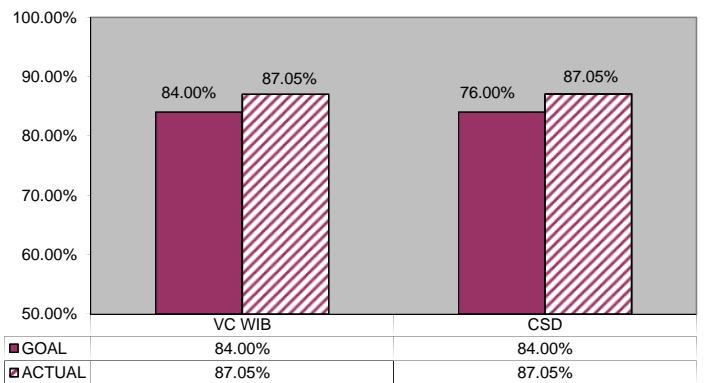


## Dislocated Worker

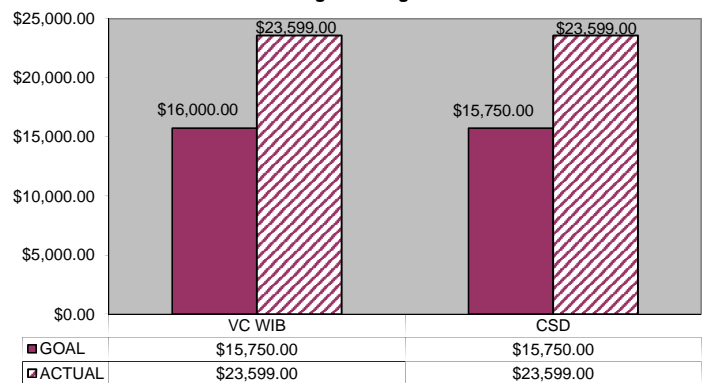
**Entered Employment Rate**



**Employment Retention Rate**



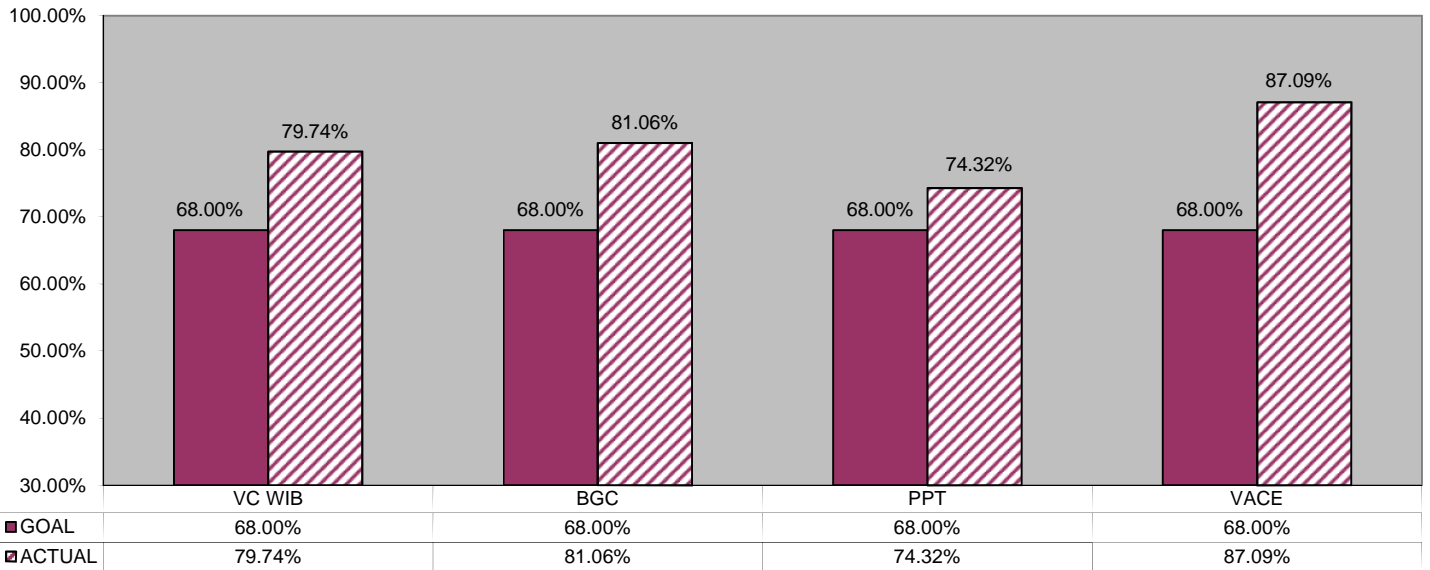
**Average Earnings**



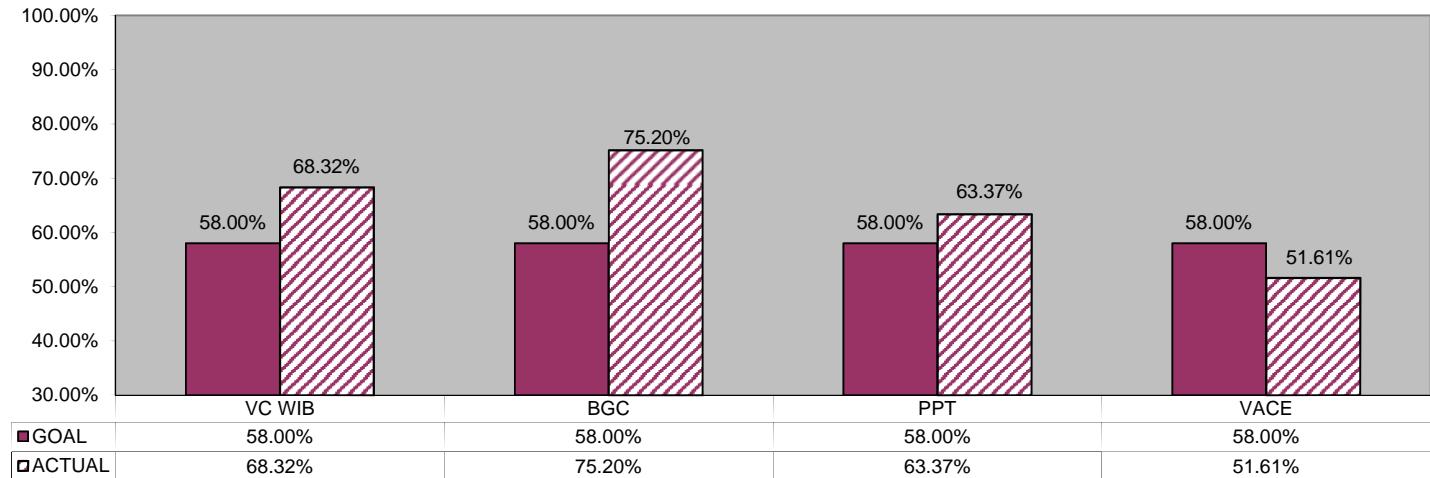
**WIA Performance Report - Common Measures Outcomes**  
**PY 2014-2015: Third Quarter (Q3) July 1, 2014 to March 31, 2015**

## Youth

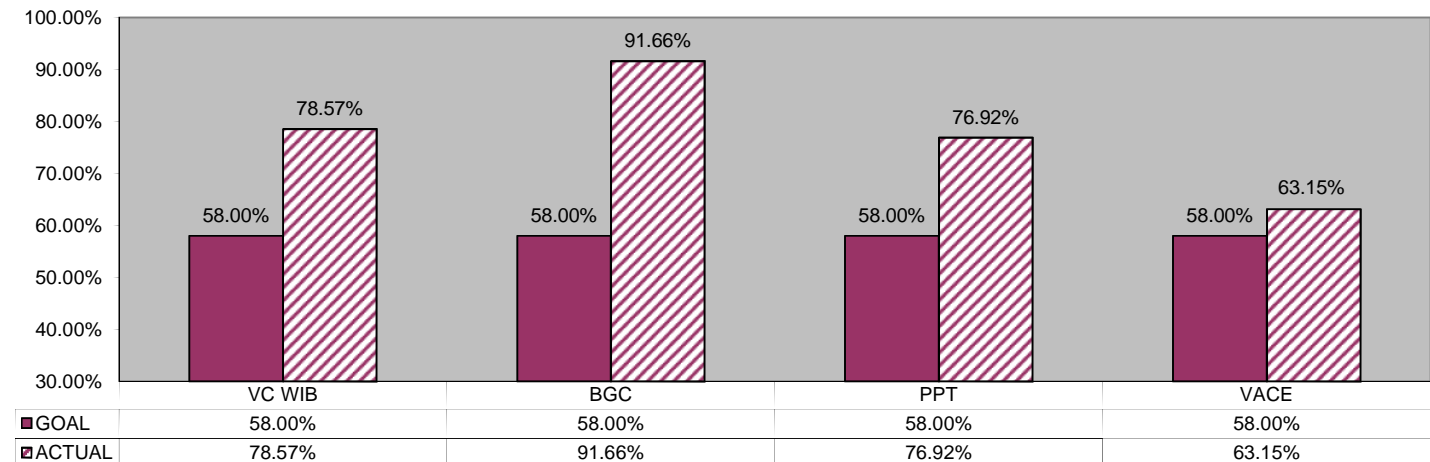
**Employment or Education Placement**



**Degree or Certificate Attainment**



**Literacy and Numeracy Gain**



Name of Reporting LWIA (may use 3-alpha code):

VTA

ATTACHMENT 1

LWIA Lead RR Contact Person:

Fred Garcia

Email address:

[fred.garcia@ventura.org](mailto:fred.garcia@ventura.org)

Telephone Number:

(805) 204-5165

Date submitted:

4/17/2015

Fax Number:

(805) 382-6554

Quarter Ending:

3/31/2015

**INSTRUCTIONS:** Activities reported on the RR 121 Report are those relating to on-site visits in response to layoffs or closures, as defined by the CWIB. Reportable on-site visits include WARN and non-WARN events. The RR 121 Report form must be completed to report visits by LWIA staff when conducting on-site layoff/closure planning meetings and/or orientations with 10 or more affected workers ONLY. Planning meetings are for information only and will not be used in the calculation of the dislocation-based formula funding factor. Complete a separate line item entry for each on-site visit occurring on different days, locations, or employers. Complete a single line item entry if multiple sessions are conducted on the same day, at a single location, and for a single employer with the note of how many multiple orientations were made that day. The RR 121 Report must be completed quarterly and submitted via e-mail by the 20th of the monthly following the quarter end to the assigned Regional Advisor, with a "cc" to the LWIA Administrator. For example, submit the 03/31 report by 04/20.

Date of Visit	Reason for On-Site Visit: Planning (Plan) or Orientation (OR)	Was more than one orientation conducted per day? Y/N	If multiple orientations per day, how many?	Company Name	Street Address	City	Zip Code	Date of Layoff that Caused Visit	Total number of affected employees	Number of affected employees who actually attended orientation	Comments
4/1/2014	Plan			Dignified Transition Solutions	One Baxter Way	Westlake Village	91362	5/16/2014	82	0	
4/1/2014	Plan			Select Staffing	One Baxter Way	Westlake Village	91362	5/16/2014	101	0	
4/8/2014	Ort	Yes	2	Bank of America	1757 Tapo Canyon Road	Simi Valley	93063	4/30/2014	75	49	
4/9/2014	Ort			Pride Industries	CBC Base Bldg 19 43rd Street	Port Hueneme	93041	4/11/2014	12	1	
4/14/2014	Plan			Camarillo Carwash	4007 Adolfo Rd	Camarillo	93012	4/14/2014	25	0	
4/15/2014	Ort	Yes	2	Corelogic	1757 Tapo Canyon Road	Simi Valley	93063	3/31/2014	40	34	
4/16/2014	Ort	Yes	2	Corelogic	1757 Tapo Canyon Road	Simi Valley	93063	3/31/2014	41	38	
4/18/2014	Plan			Microsemi	1000 Avenida Acaso	Camarillo	93012	4/22/2014	34	0	
4/21/2014	Ort	Yes	3	Dignified Transition Solutions	One Baxter Way	Westlake Village	91362	5/16/2014	82	57	
4/22/2014	Ort			Camarillo Carwash	4007 Adolfo Rd	Camarillo	93012	4/20/2014	25	13	
4/23/2014	Ort			Microsemi	1000 Avenida Acaso	Camarillo	93012	4/22/2014	34	24	
5/1/2014	Plan			Bank of America	400 National Way	Simi Valley	93065	6/22/2014	120	0	
5/1/2014	Plan			Dignified Transition Solutions	One Baxter Way	Westlake Village	91362	8/29/2014	100	0	
5/19/2014	Ort	Yes	2	Bank of America	400 National Way	Simi Valley	93065	6/22/2014	120	74	
7/15/2014	Ort			Thermasol	2255 Union Place	Simi Valley	93062	8/11/2014	21	14	
5/20/2014	Ort	Yes	3	Select Staffing	One Baxter Way	Westlake Village	91362	8/29/2014	100	51	
5/30/2014	Plan			New French Bakery	4231 Transport Street	Ventura	93003	7/23/2014	90	0	
6/10/2014	Ort	Yes	2	New French Bakery	4231 Transport Street	Ventura	93003	7/23/2014	90	13	
6/24/2014	plan	no		MBDA	5701 Lindero Canyon #4	Westlake Village	91362	7/11/2014	15	0	
7/2/2014	Plan	no		Thermasol	2255 Union Place	Simi Valley	93062	8/11/2014	21	0	
7/14/2014	Ort	no		MBDA	5701 Lindero Canyon #4	Westlake Village	91362	7/11/2014	15	11	
7/2/2014	Plan	no		Verizon	1800 Solar Drive	Oxnard	93030	7/18/2014	152	0	
7/17/2014	Plan	no		Bank of America	400 National Way	Simi Valley	93065	7/17/2014	30	0	
7/18/2014	Ort	no		Verizon	1800 Solar Drive	Oxnard	93030	7/18/2014	152	4	
7/22/2014	Ort	no		Bank of America	400 National Way	Simi Valley	93065	7/22/2014	30	21	
8/5/2014	Ort	no		Adventist Media Center	101 W. Chochran Street	Simi Valley	93065	10/31/2014	42	25	

Name of Reporting LWIA (may use 3-alpha code):

VTA

ATTACHMENT 1

LWIA Lead RR Contact Person:

Fred Garcia

Email address:

[fred.garcia@ventura.org](mailto:fred.garcia@ventura.org)

Telephone Number:

(805) 204-5165

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4/17/2015

Fax Number:

(805) 382-6554

Quarter Ending:

3/31/2015

**INSTRUCTIONS:** Activities reported on the RR 121 Report are those relating to on-site visits in response to layoffs or closures, as defined by the CWIB. Reportable on-site visits include WARN and non-WARN events. The RR 121 Report form must be completed to report visits by LWIA staff when conducting on-site layoff/closure planning meetings and/or orientations with 10 or more affected workers ONLY. Planning meetings are for information only and will not be used in the calculation of the dislocation-based formula funding factor. Complete a separate line item entry for each on-site visit occurring on different days, locations, or employers. Complete a single line item entry if multiple sessions are conducted on the same day, at a single location, and for a single employer with the note of how many multiple orientations were made that day. The RR 121 Report must be completed quarterly and submitted via e-mail by the 20th of the monthly following the quarter end to the assigned Regional Advisor, with a "cc" to the LWIA Administrator. For example, submit the 03/31 report by 04/20.

Date of Visit	Reason for On-Site Visit: Planning (Plan) or Orientation (OR)	Was more than one orientation conducted per day? Y/N	If multiple orientations per day, how many?	Company Name	Street Address	City	Zip Code	Date of Layoff that Caused Visit	Total number of affected employees	Number of affected employees who actually attended orientation	Comments
9/4/2014	Plan	no		Bank of America	400 National Way	Simi Valley	93065	10/23/2014	36	0	
9/17/2014	Ort	no		Bank of America	400 National Way	Simi Valley	93065	10/23/2014	36	15	
10/24/2014	Plan	no		VC Star	550 Camarillo Center Dr.	Camarillo	93010	10/15/2014	21	0	
10/27/2014	Ort	no		VC Star	550 Camarillo Center Dr.	Camarillo	93010	10/15/2014	21	5	
11/3/2014	Plan	no		County of Ventura Child Support	5171 Verdugo Way	Camarillo	93010	11/7/2014	15	5	
11/6/2014	Ort	no		County of Ventura Child Support	5171 Verdugo Way	Camarillo	93010	11/7/2014	15	5	
11/12/2014	Plan	no		Verizon	1800 Solar Drive	Oxnard	93030	12/27/2014	21	0	
11/17/2014	Ort	no		Verizon	1800 Solar Drive	Oxnard	93030	12/27/2014	21	18	
11/17/2014	Plan	no		Bank of America	1757 Tapo Canyon Rd.	Simi Valley	93063	12/5/2014	80	0	
11/19/2014	Ort	Yes	2	Bank of America	1757 Tapo Canyon Rd.	Simi Valley	93063	12/5/2014	80	70	
12/10/2014	Ort	no		Verizon	1800 Solar Drive	Oxnard	93033	12/27/2014	21	5	
1/7/2015	Plan	no		Packaging Corp America	2325 Statham Blvd Unit C	Oxnard	93033	1/30/2015	38	0	
1/22/2015	Ort	Yes	3	Packaging Corp America	2325 Statham Blvd Unit C	Oxnard	93033	1/30/2015	38	31	
1/13/2015	plan	no		Bank of America	1800 Tapo Canyon Rd.	Simi Valley	93063	2/20/2015	150	0	
1/26/2015	Ort	Yes	2	Bank of America	1800 Tapo Canyon Rd.	Simi Valley	93063	2/20/2015	150	123	
2/17/2015	Plan	no		OSI	2385 E. Pleasant Valley Rd.	Camarillo	93012	4/30/2015	118	0	
3/9/2015	Ort	Yes	2	OSI	2385 E. Pleasant Valley Rd.	Camarillo	93012	4/30/2015	118	29	
3/10/2015	Ort	Yes	2	OSI	2385 E. Pleasant Valley Rd.	Camarillo	93012	4/30/2015	118	54	



## Layoff Aversion 122 Report

ATTACHMENT 4

**Name of Reporting Local Area:** VTA  
**Local Area Contact Person:** Theresa Salazar Vital  
**Email address:** [theresa.vital@ventura.org](mailto:theresa.vital@ventura.org)  
**Telephone Number:** 805-477-5343  
**Fax Number:** 805-477-5386

Date Submitted: 4/17/2015Quarter Ending: 3/31/2015

**INSTRUCTIONS: Activities reported on the Layoff Aversion 122 Report are those relating to business visits by Local Workforce Investment Area (local area) staff to conduct business outreach activities and/or layoff aversion activities during any stage of the business cycle. Activities reported on this form are those relating to business visits when an activity or resource is introduced, planned, or involves follow-up or wrap-up of a prior activity. It is important that local area staff consider and document how layoff aversion activities will result in a positive outcome before allocating resources. For completion of the layoff aversion activity, documentation from the business receiving service is required to be submitted for validation of outcomes (retained at the local area).**

Date of Employer Contact	Reason (drop-down menu)	Type of Contact (drop-down)	Industry Sector Code/Title (drop down)	Local Area Priority Sector? Yes/No (drop down)	Company Name	Street Address	City	Zip Code	What business area of need was addressed? (drop down) - explain "other" in Comments	Did layoff aversion activity result in successful outcome? Yes/No (drop down)	Number of jobs saved by layoff aversion activity	Testimonial letter/ documentation of jobs saved provided by employer? Yes/No (drop down)	Comments
7/9/2014	Investigative issues and discuss layoff aversion options	On-site	72=Accommodation and Food Services	Yes	Sossy's BBQ	3140 D Newbury Road	Newbury Park	91320	Market Analysis	Yes	15	Yes	
7/15/2014	Investigative issues and discuss layoff aversion options	On-site	31-33=Manufacturing	Yes	Copy Court	2540 E. Vineyard Ave.	Oxnard, CA	93036	Financial Issues	Yes	5	Yes	
10/15/2014	Investigative issues and discuss layoff aversion options	On-site	31-33=Manufacturing	Yes	Transonic Combustion	461 Calle San Pablo	Camarillo, CA	93012	Financing (Loan)	Yes	40	Yes	
12/20/2014	Resource introduction meeting/assessment/ development plan	On-site	31-33=Manufacturing	Yes	Alba's Garment Works	3172 Bunsen Avenue #A	Ventura, CA	93001	Sales/marketing	Yes	11	Yes	
1/7/2015	Resource introduction meeting/assessment/ development plan	On-site	31-33=Manufacturing	Yes	Solarsilicon Recycling Services, LLC	322 N. Aviator Street	Camarillo, CA	93010	Process improvement	Yes	37	Yes	

**WIA Program Highlights**  
**Executive Summary PY 2014-2015**

**Transition Continues**

- WIOA – July 1
- Integrated Service Delivery System
- Focus on partnerships and collaboration
- Training with Industry Recognized Certificate/Credential
- New policies/procedures & interpretation of Notice of Proposed Rulemaking (NPRM)
- New Common Measures
- CalJobs system updates

**Universal Services/AJCC**

- Public Access to employment/career resources: (computer access, copiers, fax, phones, job listings, training information and many resources)
- Career Workshops: Power of VOS/CalJobs; Interview Skills; Resumes that Sell; Busqueda de Trabajo (Sp)
- Veterans Financial Coach (Funded by Department of Labor)
- Employer Target Recruitments (EDD/WIA/CalWORKs)

**Adult/Dislocated Worker: (Enrolled Services)**

CSD exceeded program enrollment goals by **Quarter 3 (May 18, 2015)**: Adult 161% and Dislocated Workers 123%.

282 were new unique enrollments and 231 carryovers for a total of 513.

**Training** with WIA funding prioritized to provide the following training services:

- 91 On-The-Job Training (OJTs) Agreements (WIA)
- 172 Individual Training Accounts (ITAs)
- 15 Workers provided work-based training in our “Customized Training” pilot program
- 111% Leveraged funding met/exceeded training funding expenditure goal

**Rapid Response Services Provided**

25 Rapid Response presentations were coordinated and provided

15 Unique employers served

1,358 Workers impacted

789 Workers attended a Rapid Response presentation

**Technical Assistance: (Baseline Services)**

Quality Control Certification – WIA contractor applications

Files/Document management for youth contractors

Contractor Support – WIA Eligibility

**Statewide Activities**

Grant Recipient of Workforce Innovation Fund – focus on ex-offenders

Participant in the CWA Workforce Innovation Presentation

One of four workforce areas in the state selected to pilot Generic CalJobs program module (Launch date -May 18)

Management Information System User Group member

Participation in CalJobs Reports Workgroup with EDD-WSD



### **Moving Forward: Evolving WIOA AJC System**

- WIOA Implementation Continues – July 1, 2015
- Remain focused on meeting/exceeding common measures performance
- New Employer Measures (Front/Center of WIOA)
- Focus on serving individuals with significant barriers (disabled, ex-offenders, TANF)
- Key Partnerships per WIOA – EDD Job Services, Department of Rehab; TANF
- Integrated Service Delivery System Initiative (ISD): CSD/State EDD and TANF
- Policies and Program Procedures – Update to reflect new regulations
- Training Focus - Apprenticeships

### **Employer Services – Premier Broker of Employment Services**

- Labor Exchange System
- Customized Training (pilot project)
- On-The-Job Training
- Strategic Employer Engagement (Staff participating in WIB Committees, Chambers)
- Targeted Recruitments (collaboration with EDD)
- Development of Employer “Tool kit”
- Account Executive Services

### **American Job Center of California**

- Partner relationships – Career Workshops, Target Employer Recruitments; Rapid Response
- Integrated Service Delivery Model - ISD Initiatives – TAA, Rapid Response, Lobby; Joint Training, Career Shops; Employer Targeted Recruitment; Career Academies
- Veterans Services – including Career Coaching
- Hosting Rapid Response Regional Roundtable – August 2015
- Access to partner services: Department of Rehabilitation, Public Assistance

# SMALL BUSINESS DEVELOPMENT CENTER ADVISOR ROSTER

The Economic Development Collaborative-Ventura County's Small Business Development Center of Ventura and Santa Barbara Counties has a robust roster of experienced business advisors to address every business need across a wide variety of industry sectors. As experts in their fields, our advisors are available to assist area businesses with free, confidential help.

## PROGRAM MANAGEMENT & LEADERSHIP



**Ray Bowman, Director**



Ray Bowman, M.S., CGBP, is the director of the Small Business Development Center of Ventura and Santa Barbara counties. He's a business veteran with more than 27 years' experience. He started three businesses, including an international trade consulting firm, and has worked as a consultant, trainer and manager for several SBDC offices. As an expert on international trade, Ray has consulted and worked with multinational corporations and banks. He also taught classes in international logistics, finance and import/export at several colleges and universities, is an author and has been a featured speaker on international business. Ray is the program chair for the District Export Council of Southern California.

**Subspecialties:** course curriculum, program development



**Julie Samson, Director**



Julie Samson, M.A., is the director of Santa Barbara County's Small Business Development Center and of the Scheinfeld Center for Entrepreneurship and Innovation at Santa Barbara City College. Julie oversees partnership development and outreach, capacity building for the region's small business service offerings and is responsible for effective program outcomes in regional business growth, entrepreneurship, and overall economic impact. With over 18 years' experience as a small business owner, she specializes in simple, lean, efficient startup and operations for micro-enterprises. She also helps service

providers develop proprietary offerings for a competitive edge.

**Subspecialties:** business plans, content marketing and sales, expert positioning, market validation, micro-enterprise startup and strategic planning, time management

## SENIOR ADVISORS

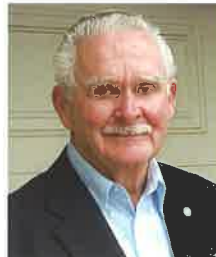


**Timothy Harrington**



Based in Northern Santa Barbara County, Timothy Harrington, MBA, has a broad background in intergovernmental communications. Timothy has also taught at several colleges and universities. He has owned several small businesses, including his management consulting business Terralink Consulting.

**Subspecialties:** business-to-business, family-owned business, partnership liaison, public-private partnerships

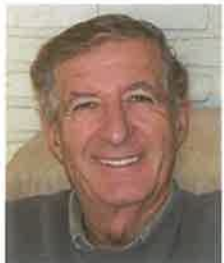


**Michael Kauffman**



Based in Santa Barbara, Michael Kauffman, MBA, Ph.D., has been an SBDC advisor for more than 15 years and was a Small Business Development Center director in Northern California. After a career in the U.S. Navy and U.S. Marine Corps, Michael has taught at the college level and written on a range of business topics. Michael has advised business owners and managers concerning successful management and marketing strategies.

**Subspecialties:** business law, business planning, loan packaging



**Joe Huggins**



Joe Huggins, MBA, brings extensive experience gained at Fortune 500 and entrepreneurial organizations, serving as vice president of Bankers Trust Co. in New York and as a senior manager at Price Waterhouse and Deloitte Touche. Joe's expertise includes professional training and instruction on all aspects of business to increase productivity and profitability for business success.

**Subspecialties:** access to capital



**Pat Sweeney**



Pat Sweeney, B.A., has had a long career of executive management and professional consulting. His expertise includes all aspects of management in the manufacturing and service industries — including lean manufacturing — financial management, cash flow analysis and general business guidance. Pat has consulted with more than 800 small businesses

and startup entrepreneurs in the Ventura County region.

**Subspecialties:** executive mentoring, mergers and acquisitions, organizational development

To learn more about our advisors and accessing services through the EDC-VC's SBDC in Ventura County: 805-384-1800 or [info@edc-vc.com](mailto:info@edc-vc.com). Or visit [www.edc-vc.com](http://www.edc-vc.com).

For Santa Barbara County: 805-892-3643 or [info@sbcountysbdc.org](mailto:info@sbcountysbdc.org). Or visit [www.sbcountysbdc.org](http://www.sbcountysbdc.org).



# Advisor Roster

## BUSINESS ADVISORS & TRAINERS



**Bill Bartels** C/B L/C M/O S/P

Bill Bartels, B.A., is the principal in a diversified farming/management/organizational development company generalizing in facilitation of diverse teams with divergent ideas and goals. Bill works in public policy and spent 17 years with the city of Fillmore in various roles, concluding his tenure as deputy city manager. Bill served on the Ventura County Planning Commission for 12 years and is a fourth-generation Ventura County farmer.

**Subspecialties:** agriculture and energy efficiency, government and hazardous materials management, project entitlement



**Marvin Boateng** F

Marvin Boateng, MPPA, has more than five years' experience in the banking industry, including branch management and as a financial service specialist. His areas of expertise include commercial, small business and SBA lending, along with financial analysis, and business underwriting and development. Marvin was a branch manager at U.S. Bank in Canoga Park and an assistant branch manager at U.S. Bank in Santa Clarita.

**Subspecialties:** access to capital



**Greg Bracy** E C/B MFC

Greg Bracy, B.S., is an engineering entrepreneur with experience in multiple system designs. He is a partner and electrical engineering consultant for Simi Valley-based Illuminati Engineering, where he has designed circuit boards and systems for multiple industries including medical, commercial and military aerospace, commercial electronics and automotive aftermarket products. He advises business owners in the areas

of engineering, product development and manufacturing.

**Subspecialties:** unmanned aerial vehicle technology



**Clare Briglio** E H/R M/O M/S S/P

Clare Briglio, B.A., is the owner and founder of KINGS & PRIESTS, an interior design and consulting business. Clare specializes in understanding every facet of corporate structure and developing key strategies that enable small businesses to reach their full potential. Her skill set includes identifying markets for the craft community and creating branding strategies that increase exposure and product strength. She has over 10 years' experience

working in art and design, as well as human resources, corporate branding and fund development.

**Subspecialties:** micro-business startup strategies, new product development and sourcing, organizational development, process improvement, strategic planning



**Carlos Conejo** M/O S/P

Carlos Conejo, B.A., is president of Peak Performance Seminars, Training & Consulting. A leadership and management advisor specializing in Lean and Six-Sigma methodology, he is a Lean Six Sigma Master Black Belt. Carlos started his career as a product manager and sales manager for the managed health-care industry, where he specialized in business turnaround. He is a published author and frequent speaker at conventions and conferences.

**Subspecialties:** bilingual in English and Spanish, cost recovery, cost reductions, lean manufacturing, Six Sigma



**Paul Daniel** F

Paul Daniel, B.A., is the principal of Gibraltar CFO Services, LLC, which provides chief financial officer services to companies ranging in size from startups to \$20 million. He has over 20 years of experience as a CFO, working in a wide range of industries. Paul also co-founded a high technology startup that was sold to an industry leader, and helped build an Internet communications company that was sold to a multi-national telecommunications firm.



**Dean Dela Cruz** MFC M/O S/P

Dean Dela Cruz, B.S., is a principal consultant with APBTS, a consulting firm supporting business leaders in the deployment and training of Lean Six Sigma in manufacturing and healthcare. In addition, his team of highly skilled consultants provides specialized engineering-based studies key to generating cash flow: R&D/manufacturing, software development tax credits, cost segregation and energy management.

**Subspecialties:** business process improvement, cost recovery/reductions, lean manufacturing, lean product development, Six Sigma



**Elva de la Torre** C/B L/C M/O S/P

Elva de la Torre, MBA., is the owner and founder of de la Torre Consulting in Ventura. While employed with the county of Riverside, she gained governmental permitting experience in subdivisions and assisted with the development of Temecula and Murrieta. In 2008, she staffed a design review committee and worked as a zoning code enforcement officer for the city of Santa Barbara. She is a licensed broker under the California Bureau of Real Estate.

**Subspecialties:** bilingual in English and Spanish



**Anthony Curtis Elliott** F

Anthony Curtis Elliott, B.A., CPA, is a forensic accountant and intellectual property "royalty audit" specialist who performs royalty and contract compliance and related consulting services to a broad base of companies. With more than 30 years' experience in accounting and finance, he has held positions as accounting director and controller for both medium and large companies. In 1993, he developed a broad-based accounting and consulting practice. His corporate clients are based in the United States, Canada and Japan.

**Subspecialties:** international business



**Gonzalo Fernandez** F S/P

Gonzalo Fernandez has a business degree from La Salle Business College in Havana, Cuba. He is the founder of GBF Consulting, a small business financing advisory. His areas of expertise are analyzing and securing business loans, and strategic planning. An experienced banker, he has held senior management positions at national, regional and community banks, including First California and Santa Barbara Bank & Trust. He has also developed and grown SBA lending programs throughout California.

**Subspecialties:** bilingual in English and Spanish



### John Haughey G/B I/B M/O M/S

John Haughey, B.S., is the CEO/managing partner of Brookstone Group Inc., a domestic and international company. John lives in Beijing, China, and has spent more than 28 years working in Asia, Europe and the U.S. He formed Brookstone International as a Foreign Invested Commercial Enterprise that focuses on reselling enterprise solutions used in data centers. John has created long-term business plans, advised marketing and sales departments, and managed the government relationship team in China.

**Subspecialties:** account management, business startup, establishing business entities in China



### Shalene Hayman F

Shalene Hayman, B.S., has worked in the accounting industry for more than 20 years. She has experience with local public accounting firms and as a partner and principal in her own firms specializing on managerial finance/accounting functions. She is the CFO/Controller for many large nonprofit organizations and small businesses in Ventura and Santa Barbara counties.

**Subspecialties:** financial management, QuickBooks



### Lou Izzo E G/B I/B M/O MFC M/S S/P

Lou Izzo, MAOM, is the owner and senior consultant at Coherent Business Development Consulting. Lou has over 30 years' experience in senior business development positions in small technology businesses. He has experience in the defense, commercial aerospace, space, medical devices and sensors industries, among others. He has a strong international business record, as well as advanced skills in strategic planning, contract negotiations, export, product development, proposal management, program management and sales and marketing.

**Subspecialties:** business plans, cultural aspects of international business, ITAR/export compliance, organizational development, SBIR, startup strategies and financing



### Sean L. Leonard M/O

Sean L. Leonard, MBA, is the president and founder of S.L. Leonard & Associates, Inc., which oversees multi-million dollar real estate projects primarily for nonprofits, developers and public entities. He has more than 30 years' experience in the Southern California real estate development and construction industry. Sean brings the appropriate resources into projects at the appropriate time and is an expert at project closeouts and turnarounds. Sean managed two projects, which were awarded the prestigious AIA Presidential Award for Project Team of the Year.

**Subspecialties:** design and construction management



### Sylvia Martini I/B M/S

Sylvia Martini, B.A., supports clients with global trade, marketing and sales, public relations and web communications. Bilingual in German and English, she has over 20 years' experience in international marketing and sales in several diverse industries, where she developed media and public relations plans, conducted competitive analyses, planned and organized client events and trade shows, and substantially increased sales. Sylvia has an international business certificate, and is a certified global

business professional from NASBITE International.

**Subspecialties:** competitive analysis, media, mobile and online marketing, public relations, web communications and web design

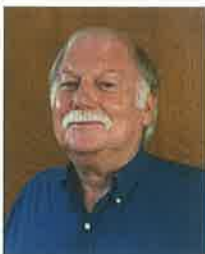


### Carolyn McCall E G/B I/B M/O MFC M/S S/P

Carolyn McCall, B.A., is the founder and president of McCall Consulting Group, a global fashion business development practice in Santa Barbara. Carolyn is a fashion industry executive with over 25 years of experience in global retail and wholesale apparel, footwear and accessories. Her background includes specialty retail companies and international lifestyle brands. As a business strategist and customer-centric industry expert,

she helps companies create strategies to maximize opportunities and minimize risks, execute their plans and grow brand identity.

**Subspecialties:** brand positioning, merchandising/buying, product development and sourcing, retail stores, sales and distribution, startups, strategic planning



### Matt McConville G/B I/B M/O S/P

Matt McConville, PMP, MBA, is the principal of The Captree Company and has experience in government, commercial, and international contracts and subcontracts management; negotiating complex contracts; teaming and other business agreements in diverse international environments. Matt helps companies with negotiation preparation and has taught an interest-based negotiation process. A certified Project Management Professional, he helps businesses develop strategy, establish and improve contracts functions, and provides proposal strategy, leadership and process.

**Subspecialties:** contracts management, export licensing, general business management, international business, negotiation, proposals, strategy



### Kevin McVeary G/B

Kevin McVeary, B.A., is a partner and senior consultant with RBC Consultants, which advises restaurants, bars and nightclubs in all aspects of operations. He has nearly 20 years' experience working with businesses in the food and drink industry and has extensive knowledge in opening and operating new restaurant venues, including construction, projections, budgets and P&Ls. He has hired, trained and coached staffs of businesses with more than 150 employees and annual sales of \$7 million.

**Subspecialties:** business startup





**Ron Meritt**

Ron Meritt, B.A., is the president of Meritt International and Olens Technology. He invented and patented a portable video system for vehicles and created a market that grew to more than \$200 million in 18 months. He has worked in many countries as a field engineer in the semiconductor and robotics industries, and has been an executive managing global engineering organizations. His company now designs, manufactures and globally distributes multiple products in different industries.

**Subspecialties:** electronics, importing, lean manufacturing



**Melissa Visconti Moreno**

Melissa Visconti Moreno, J.D., is the dean of Educational Programs-Business at Santa Barbara City College and the former founding executive director of the Scheinfeld Center for Entrepreneurship and Innovation. Melissa oversees partnership development and outreach, capacity building for the region's small business service offerings and is responsible for effective program outcomes in regional business growth, entrepreneurship and overall economic impact. She has managed several

small businesses and is the author of *The Practical Guide to a Rapid Start-up*.

**Subspecialties:** educational program development



**Rose-Lise Obetz**

Rose-Lise Obetz, M.A., Ph.D., is a marketing and training advisor. She specializes in working with clients on a shoestring budget to develop targeted marketing plans to attract new customers and increase sales. Marketing strategies include traditional methods and new media platforms. She works with small business owners to brand their products and services. The consulting practice she launched in 1982 helps large corporations across industry sectors train and develop their workforce.

**Subspecialties:** communications, customer service, presentation skills, restaurant industry consulting, including food safety, waitstaff training, and menu design



**Keith Phillips**

Keith Phillips, B.S., is the founder and CEO of Qimono, a cloud-based virtual business advisor that helps other businesses incubate and grow. He was a brand manager for Unilever in South Africa, international marketing manager for Gillette in Africa and the Middle East, director of business for Apple in the United States and CEO of Telecom Equipment Supplies, New Zealand. He has also been chairman and director of five companies.

**Subspecialties:** angel investment, organizational development, venture capital



**Kay Wallace**

Kay Wallace is the founder and CEO of Tools 2 Connect, and has worked in the computer technology and marketing industry for more than 30 years. Kay is a speaker, consultant and trainer on social media. As an SBDC advisor, she trains businesses on how to market with social media and other online tools and how to manage their online reputation. She helps develop successful marketing strategies using social media, email campaigns, video marketing and more.

**Subspecialties:** management/operations, strategic planning



**Georg Winkler**

Georg Winkler, B.A., is coordinator of the Russell Fischer Business Collection at the City of Camarillo Public Library, home to many online and print resources for entrepreneurs and small businesses. Specializing in research, Georg trains entrepreneurs in acquiring information for business development and marketing research. Georg is also a board member of the Conejo Open Space Foundation, where he manages the website and online marketing.

**Subspecialties:** business, demographic and industry research



**Eric Zackrison**

Eric Zackrison, M.A., MBA, is finishing a doctorate program, where he's studying ways coordination is accomplished and maintained. A manager and entrepreneur for over 20 years, he has been a university instructor for six years, teaching public speaking, small group communication, communication theory, interviewing and organizational communication. He connects the theoretical and the practical when working with clients on topics as varied as leadership coaching, team building, strategy and planning, marketing, organizational structure and cost controls.

**Subspecialties:** leadership development, restaurant/hospitality industry, team building

## Key:

- |                        |                       |
|------------------------|-----------------------|
| Entrepreneurship       | Legal/Compliance      |
| Finance                | Management/Operations |
| General Business       | Manufacturing         |
| Human Resources        | Marketing/Sales       |
| International Business | Strategic Planning    |



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Business &  
Entrepreneurship  
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Cuesta College



# BUILDING OUR FUTURE WORKFORCE

WORKFORCE INVESTMENT BOARD  
855 Partridge Drive • Ventura, CA 93003  
Phone: 805-477-5342 • Fax 805-477-5386  
[www.wib.ventura.org](http://www.wib.ventura.org)



**TO: WORKFORCE INVESTMENT BOARD**

**FROM: TONY SKINNER, CHAIR  
YOUTH COUNCIL**

**DATE: MAY 21, 2015**

**SUBJECT: RECOMMENDATION THAT THE EXECUTIVE COMMITTEE OF THE  
WORKFORCE INVESTMENT BOARD OF VENTURA COUNTY (WIB)  
APPROVE THE RENEWAL OF CONTRACTS TO PROVIDE  
COMPREHENSIVE YOUTH SERVICES IN AMOUNTS NOT TO EXCEED  
\$475,000 FOR THE BOYS AND GIRLS CLUBS OF GREATER OXNARD AND  
PORT HUENEME, \$475,000 FOR PATHPOINT, AND \$260,000 FOR  
VENTURA ADULT AND CONTINUING EDUCATION FROM JULY 1, 2015,  
THROUGH JUNE 30, 2016**

## RECOMMENDATION

Recommend that the Executive Committee of the Workforce Investment Board of Ventura County (WIB) approve the renewal of contracts to provide comprehensive youth services in amounts not to exceed \$475,000 for the Boys and Girls Clubs of Greater Oxnard and Port Hueneme, \$475,000 for PathPoint, and \$260,000 for Ventura Adult and Continuing Education from July 1, 2015, through June 30, 2016

## DISCUSSION

At the conclusion of the second year Program Year (PY) 2014-2015, of three contracts to provide WIA comprehensive youth programs in Ventura County, it is necessary to make a decision regarding renewal of each contract for a third year (PY 2015-2016).

On June 3, 2015, the WIB Youth Council discussed the second year performance (as of March 30, 2015) of each of three WIA comprehensive youth program providers: Boys and Girls Clubs of Greater Oxnard and Port Hueneme, PathPoint and Ventura Adult and Continuing Education. That performance had met or exceeded all requirements to date.

Additional discussion involved the new WIOA requirements (1) to spend 75% of the entire WIOA Youth allotment on out-of-school youth and (2) to spend 20% of the entire WIOA Youth allotment on workplace-related activities. This discussion led to a consensus that all new enrollments in all three contracts should be out-of-school and that in-school carry-in enrollments would be funded first with remaining WIA funds. To attain the overall 20% requirement, the Council decided that providers' contracts should stipulate a 25% expenditure rate for work-place related activities.

Fully recognizing the challenged posed by the new requirements, the Council determined that the new contracts should be initially funded at the amounts first available in the 2014-2015 contracts, and noted that the WIB staff should recommend appropriate augmentation of all three budgets when the full amount of 2014-2015 carry-over funds to 2015-2016 is known.

Executive Committee action today approves third year contract terms for the three Youth providers. The actions of the Board of Supervisors and of the Executive Committee will be reported to the WIB at its meeting on June 18, 2015.

If you have questions or need more information, please call me at (805) 642-2149, or contact Richard McNeal at (805) 477-5344, email [richard.mcneal@ventura.org](mailto:richard.mcneal@ventura.org).

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**TO: EXECUTIVE COMMITTEE**

**FROM: CHERYL MOORE, EXECUTIVE DIRECTOR  
WORKFORCE INVESTMENT BOARD**

**DATE: MAY 21, 2015**

**SUBJECT: RECOMMENDATION THAT THE EXECUTIVE COMMITTEE OF THE WORKFORCE INVESTMENT BOARD OF VENTURA COUNTY (WIB) APPROVE THE RENEWAL OF A CONTRACT WITH THE ECONOMIC DEVELOPMENT COLLABORATIVE-VENTURA COUNTY TO PROVIDE BUSINESS SERVICES TO THE WIB IN AN AMOUNT NOT TO EXCEED \$95,000 IN PROGRAM YEAR JULY 1, 2015, THROUGH JUNE 30, 2016**

## RECOMMENDATION

Recommend that the Executive Committee of the Workforce Investment Board of Ventura County (WIB) approve the renewal of a contract with the Economic Development Collaborative-Ventura County (EDC-VC) to provide business services to the WIB from July 1, 2015, through June 30, 2016 in an amount not to exceed \$95,000.

## DISCUSSION

At the August 14, 2014 meeting, the WIB Executive Committee approved ratification of the July 15, 2014 Board of Supervisors ratification and approval for a contract with the Economic Development Collaborative-Ventura County (EDC-VC), in an amount not to exceed \$95,000 in WIA funds. This is the initial contract, through Request for Proposals-RFP #RR1415 funded from July 1, 2014, through June 30, 2015 (Program Year 2014-2015).

The EDC-VC Business Retention and Layoff Aversion program provides Workforce Investment Act (WIA) services designed to reduce job losses in Ventura County. Business services include business layoff aversion support, focusing on (but not limited to) employers with healthcare; technology-related jobs (e.g., manufacturing); and clean/green-related jobs (e.g., energy/recycling, building/design; tourism/agriculture). Program activities and outcomes are conducted and reported in alignment with the California Workforce Investment Board's policy framework for Local Workforce Investment Boards Rapid Response systems.

## OUTCOMES

At the November 20, 2014 meeting, the Executive Committee approved the following evaluation factors to be met by EDC-VC by today's meeting:

- Monitoring/Audit Findings: All findings resolved or in resolution.
- Rapid Response (Allowable) Outcomes – Meet a minimum 75% of program plan goal for at-risk employers Served, at-risk jobs retained, at-risk Incumbent Workers trained, contract expenditures, and in-kind expenditures. Average customer satisfaction score is minimum of 4 on a 5 point scale.



The status of EDC-VC's program outcomes through May 11, 2015 are detailed in the attached Business Retention/Layoff Aversion Services Quarterly Review/business log and summarized below:

1. Monitoring/Audit Findings: All findings resolved or in resolution.  
Outcome: County monitoring resulted in no findings.
2. Employers Served (75% to plan)  
Outcome: Achieved 175% to plan
3. Jobs Retained (75% to plan)  
Outcome: Achieved 135% to plan
4. Incumbent Workers Trained (75% to plan)  
Outcome: Achieved 135% to plan (non-WIA funded)
5. Contract Expenditures (75% to plan)  
Outcome: Achieved 68.73% to plan
6. Contract In-kind Expenditures (75% to plan)  
Outcome: Achieved 89.36% to plan
7. Average Customer Satisfaction Score of 4 on a 5 Point Scale  
Outcome: Achieved average score of 4.77 or 95% to plan

Executive Committee action today approves a second year contract term for EDC-VC. The actions of the Board of Supervisors and of the Executive Committee will be reported to the WIB at its meeting on June 18, 2015.

If you have questions, please call me at (805) 477-5306, or contact Theresa Salazar Vital at (805) 477-5343, email [theresa.vital@ventura.org](mailto:theresa.vital@ventura.org).



## Business Retention/Layoff Aversion Services Program Year 2014 – 2015 Quarterly Review

Quarter 1 (Q1) Cumulative July, 2014 - September, 2014	Quarter 2 (Q2) Cumulative July, 2014- December, 2014	Quarter 3 (Q3) Cumulative July, 2014 - March 31, 2015 and through May 11, 2015 <b>WIB EVALUATION May 21, 2015</b>	Quarter 4 (Q4) Cumulative July, 2014 - June, 2015
		X	

### Plan vs. Actual Outcomes for the Contract Period of July 1, 2014 – June 30, 2015

	# At-Risk Employers Served (with 1 or more At-Risk Workers) Provided Layoff Aversion Services	# Jobs At-Risk and Retained after Completion of all Employer Services and at 6 Weeks Retention for Employers Served *	# At-Risk Workers provided Incumbent Worker Training (IWT) for Job Retention by all Providers (A) WIA (B) non-WIA	(A) Contract Expenditures (B) In- Kind Expenditures	Average Customer Satisfaction Score for Employers Served
<b>Plan to Actual</b>					
<b>Program Year (PY) Plan (July 1, 2014 through June 30, 2015)</b>	12	80 *	B = 60	A = \$95,000 B = \$70,000	4 on 5 point scale
<b>Minimum Number For WIB Evaluation</b>	9	60 *	B = 45	A = \$71,250 B = \$52,500	4 on 5 point scale
<b>Cumulative Actual</b>	21	108 *	B = 81	A = \$65,298 B = \$62,553	4.77
<b>Plan to Actual and Average Score</b>	175%	135% *	135%	A = 68.73% B = 89.36%	95%

\* Number of Jobs Saved by Layoff Aversion Activity for 122 State Report

ECONOMIC DEVELOPMENT COLLABORATIVE-VENTURA COUNTY  
RAPID RESPONSE BUSINESS RETENTION/LAYOFF AVERSION

**PY 2014-2015 Third Quarter (Q3: July, 2014 through December 31, 2014) including outcomes through May 11, 2015**

	Employer	City	Date(s) of Employer Visit(s)	# of Employees	# Jobs At-Risk	# At-Risk Employers Served (with 1 or more At-Risk Workers) Provided Layoff Aversion Services	# Jobs At-Risk and Retained after Completion of All Employer Service and at 6 Weeks Retention for Employers Served *	At-Risk Workers provided Incumbent Worker Training (IWT) for Job Retention by all Providers (A) WIA (B) non-WIA	Average Customer Satisfaction Score for Employers Served (4 on 5 point scale)	IWT Provided in (A) Healthcare (B) Manufacturing (C) Clean Green "multi sector" (D) Other Sector	# At-Risk Employers Served (with 10 or more At-Risk Workers) Referred to CSD for Required Rapid Response Activity	Industry	Classifications Affected (list 3 major)
1	Royal Riding	Ventura	07/01/14	2	2	1						Manufacturing	Owner, Sales, Accounting
2	Zesto Audio	Thousand Oaks	07/07/14	2	2	1						Manufacturing	Owner, Sales, Accounting
3	Sossy's BBQ	Newbury Park	07/09/14	15	15	1	15		5			Accommodation and Food Service	Accounting, Waiters, Hostess
4	German Deli	Ventura	07/14/14	2	2	1			4.8			Accommodation and Food Service	Accounting, Sales, Customer Service
5	Copy Court	Oxnard	07/15/14	5	5	1	5		5			Manufacturing	Accounting, Sales, Customer Service
6	Transonic Combustion	Camarillo	07/30/14	40	40	1	40					Manufacturing	Technical, Accounting, Service
7	Cheatham Consultants, Inc.	Ventura	07/30/14	2	2	1						Sales	Accounting, Owner, Service
8	Daley Landscaping	Ojai	08/05/14	8	8	1			5			Sales	Accounting, Owner, Sales
9	Aerovironment	Simi Valley	09/08/14	594	81	1		B=81		B=81		Manufacturing	Technical, Accounting, Service
10	Tresieras Brothers Corp.	Moorpark	09/22/14	330	20	1						Accommodation and Food Service	Customer Service, Accounting, Owner
11	OVA Arts Gallery	Ojai	09/24/14	14	14	1			5			Sales	Customer Service, Accounting, Owner
12	Agnew Translation Services	Westlake Village	11/04/14	6	6	1						Service	Technical, Accounting, Service
13	Multisensory Fitness Inc.	Oxnard	11/12/14	18	18	1						Manufacturing	Technical, Accounting, Service
14	Alba's Garment Works	Oxnard	12/20/14	15	15	1	11		5			Sales	Accounting, Owner, Sales
15	AutoLocators, Inc.	Ventura	12/20/14	2	2	1						Manufacturing	Customer Service, Technical, Accounting
16	Solarsilicon Recycling Services	Camarillo	01/07/15	70	37	1	37		3.6			Manufacturing	Technical, Accounting, Service
17	Lopez Family Chiropractic	Camarillo	04/16/15	1	1	1						Professional	Technical, Accounting, Service
18	Megabit Networks	Oxnard	04/22/15	10	10	1						Professional	Technical, Accounting, Service
19	CMF Creative Services	Oak View	04/22/15	3	3	1						Service	Technical, Accounting, Service
20	All Things Tea	Camarillo	04/27/15	2	2	1						Accommodation and Food Service	Customer Service, Technical, Accounting
21	Crutchley Photography	Ventura	05/08/15	2	2	1						Professional	Accounting, Technical, Service
	<b>Totals/Average</b>			1143	287	21	108	B=81	4.77	B=81	0		

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**TO: EXECUTIVE COMMITTEE**

**FROM: BRIAN GABLER, CHAIR  
OUTREACH COMMITTEE**

**DATE: MAY 21, 2015**

**SUBJECT: RECOMMENDATION THAT THE WORKFORCE INVESTMENT BOARD OF VENTURA COUNTY (WIB) APPROVE THE RENEWAL OF A CONTRACT WITH the AGENCY TO PROVIDE MARKETING AND PUBLIC RELATIONS SERVICES TO THE WIB IN AN AMOUNT NOT TO EXCEED \$150,000 IN PROGRAM YEAR JULY 1, 2015, THROUGH JUNE 30, 2016**

## RECOMMENDATION

Recommend that the Executive Committee approve a recommendation for the Workforce Investment Board of Ventura County (WIB) to approve the renewal of a contract with the Agency to provide marketing and public relations services to the WIB from July 1, 2015, through June 30, 2016 in an amount not to exceed \$150,000.

## DISCUSSION

On May 20, 2015, the Outreach Committee reviewed and evaluated the year-to-date deliverables and performance of the Agency under the 2014-2015 contract. Indicators of success were applied to the plan timeline and project deliverables:

- Timely delivery of projects achieved
- Project completion on budget
- Creative design and media negotiation aligned with budget
- Status reports on projects presented to the Outreach Committee on a timely basis
- Ability of the Agency to adapt and respond to changes in marketing and outreach needs for the WIB

Working in alignment with the WIB strategy, goals, and program support described in the WIB-approved plan, and in partnership with the WIB Outreach Committee, the Agency had provided creative design, production and copywriting (e.g., brochures, flyers, ads), media negotiation and placement (e.g., newspapers, newsletters, English radio, public access programming), and public relations (e.g., press releases, media placements, public service announcements and placement, broadcast interviews) for targeted outreach to youth, job seekers, employers, and the community.

The Committee determined that the Agency had completed all deliverables on time, on budget, and according to plan, while also demonstrating creativity and flexibility in responding to changing marketing and outreach needs as the year progressed. Committee members then approved a recommendation to the Executive Committee for renewal of the Agency contract for 2015-2016.

Executive Committee action today approves a second year contract term for the Agency. The actions of the Board of Supervisors and of the Executive Committee will be reported to the WIB at its meeting on June 18, 2015.

If you have questions, please call me at (805) 583-6701, or contact Talia Barrera at (805) 477-5341, email [talía.barrera@ventura.org](mailto:talía.barrera@ventura.org).



## WIB Outreach Annual Review July 1 – May 15, 2015

### **Employer Outreach**

#### **Promote Business Goals**

- Develop and implement business, economic development, and job seeker outreach strategies to raise awareness of, and participation in, workforce development programs and services.
- Implement outreach campaign to build on and reinforce awareness of the business resources and support in Ventura County

The following activities were implemented to promote WIB Business Goals:

- **Paid Media Outreach** – Negotiated, planned and placed paid media for
  - Total Cost: \$29,500
  - Total Value: \$58,210 (197% of Cost)
  - Total Impressions: 1,665,054
- **Workforce Wednesday: August 2014 to June 2015**
  - Researched/recommended topics, recruited/coordinated participants and developed discussion guide for (8) Workforce Wednesdays with (2) more in development for May and June 2015.
- **Workforce Update E-Newsletter August 2014 to June 2015**
  - Researched and developed content, designed and disseminated (5) workforce updates to approximately 72,000 recipients with (1) more in development for June 2015. (Impressions included in above “Paid Media Outreach” summary. Open rates range from 20 to 30% for WIB Cohorts and 6 to 10% for general business lists.
- **Ventura County Grows Business Website & Facebook – July 1, 2014 to May 15, 2015**
- Managed content updates, corrections and additions.
  - Website: 67% increase in unique visitors over July 1 to May 15, 2014
    - 4,320 Sessions/3,852 Unique Visitors
    - 1:14 minute average session duration
    - 1.91 pages/session
    - 70.76% Bounce Rate
- **VCGB Facebook – 1,308 Fans (through 5/15/15)**
- Managed content, research, development and posting.
  - Fans: 6.7% increase over previous year.
  - Facebook Paid Media for Spring 2015 Outreach: (Impressions and cost included above.)
    - 15 Sec Video Ads: Developed from the 11 testimonials and 3, 30 sec TV spots for use in social media.
      - Reach: 43,107/Views: 46,181
      - Clicks: 2,484
      - Click through Rate: 2.079%
- **VCGB Speakers Bureau** – Coordinated (12) VCGB Speakers Bureau presentations by soliciting presentation dates, recruiting/training WIB Board Member presenters and developing PPT presentation with the purpose of making members of the business community aware of the low- and no-cost services available in Ventura County to help businesses grow. (10) Presentations completed, (2) scheduled for June and September 2015.



## WIB Outreach Annual Review July 1 – May 15, 2015

### **Employer Outreach – New Elements Developed**

- VCGB Pull-Up Sign
- ½ Page VCGB Ad for EDC-VC Annual Meeting
- VCGB Speakers Bureau PowerPoint
- Misc:
  - 2014 Manufacturing Day Outreach
  - MRVC Manufacturing Day “Welcome” Posters
  - MRVC Annual Meeting Posters

### **Youth Outreach**

#### **Promote Youth Goals**

- Engage youth with early exposure to career pathways (elementary/middle school), including non-college options, with a focus on work ethic and success. Develop media relevant outreach strategies to target Ventura County youth with key messages.

The following activities were implemented to promote WIB Youth Goals:

- **Paid Media Outreach** – Negotiated, planned and placed paid media for
  - Total Cost: \$20,500
  - Total Value: \$36,056 (176% of Cost)
  - Total Impressions: 1,266,804
- **VC Jobs With a Future Website – July 1, 2014 to May 15, 2015 (Campaign goes through 5/31/15)**
- Managed content updates, corrections and additions.
  - 5% increase over 7/1/13 to 5/15/14
  - **91% increase over 7/1/14 to 1/16/15**
  - 5,423 Sessions/4,896 Visits
  - 1.96 pages per visit/1.25 minutes average visit duration
  - 66.33% bounce rate
- **VCJWF twitter – 165 Followers as of 5/15/15 (launched 4/15, paid campaign goes through 5/31)**
- Designed, developed launched new Twitter page. Managed content, research, development and posting.
  - **Follower Campaign:** Developed to bring attention to our new page and attract Ventura County residents.
    - Impressions: 30,314
    - Followers: 55
    - Follow Rate: 0.18%
  - **Engagement Campaign:** Created for awareness of Ventura County Jobs with a Future resources and clicks back to the website.
    - Impressions: 16,098
    - Engagements: 283
    - Engagement Rate: 1.76%



## WIB Outreach Annual Review July 1 – May 15, 2015

- **Youth Outreach – New Elements Developed**
  - “Look Ahead” TV and Radio Spots Updated
  - New :60 Spanish radio
  - :30 Pandora spot
  - VCJWF Twitter Page Launched
  - VCJWF Eblast Template & Career Center Coordinator Eblast
  - VCJWF Website Updates – Developed graphics/content for 16 website additions
  - Preliminary development of a Youth Outreach Speakers Bureau PowerPoint
  - (3) New case history posters developed, designed and produced.

### **Job Seeker Outreach**

#### **Promote Job Seeker Goals**

- Implement outreach campaign to build on and reinforce awareness of job seeker resources for those who might require these services as they become unemployed.

The following activities were implemented to promote WIB Job Seeker Goals:

- **Paid Media Outreach** – Negotiated, planned and placed Job Seeker messaging on KCLU as part of WIB General Outreach. See “General Outreach” for details.
- **Career Shops** – Developed and distributed monthly calendar releases for Career Shops available free-of-charge at America’s Job Center of California Ventura County Locations.
  - Calendar listings published in 53 media to date including: VCStar, Acorn (various), Patches (various), KDAR, Santa Paula Times, Sespe Sun, VC Reporter, Happenings, Fillmore Gazette, Santa Rosa Community News, 805 Coffee News

### **General Outreach**

#### **Promote WIB Goals**

- Reinforce the visibility of the WIB and its members in the community as a valuable workforce development resource dedicated to supporting the needs of Ventura County employers, job seekers and youth.

The following activities were implemented to promote General WIB Goals:

- **Paid Media Outreach** – Negotiated, planned and placed paid media for
  - Total Cost: \$22,575 (KCLU Contract billed direct to WIB)
  - Total Value: \$35,690 (158% of cost)
  - Total Impressions: 3,423,316 (Includes Op-Eds and General Outreach Eblasts)
- **New Releases, Interviews, Op-Eds:** Published in 22 media including VCStar, Acorn (Various), PRLog, Sespe Sun, PR.Com, Patches (various), PubMemo.com
  - New board member release: Patricia Schulz, May 4
  - 2015 WIB Awards Call for Nominations release, March 1
  - Acorn Melissa Simon Interview with Cheryl Moore, January 2 & 16
  - VCStar – “Labor Day” Carol Lawrence Interview Cheryl Moore, September 20
  - 2014 Manufacturing Day Media Advisory, September 29
  - Camarillo City Scene Interview Guide and Coordination, Brian Gabler, August 28
  - Op-Eds Developed/Coordinated Placed in the VCStar:
    - “The Older Workforce Challenge,” Victoria Jump, February 1
    - “Brighter Days,” Mike Soules, December 14



## WIB Outreach Annual Review July 1 – May 15, 2015

- **WIB Website Redesign/Rebranding**
  - Home Page & Landing Page Designs
  - Site Map Redesign
  - PSD design files for the above to IT on 4/15/15
  - Developed 'content' document draft with to spec with site map and photo/link resources.
  - Developed photo resources for site placement
  - Coordinate site construction with IT starting in June
- **Job Outlook Full Report & Eblasts**
  - Researched compiled and distributed monthly Job Outlook report. (10) Completed to date, (2) to come.
  - Design Job Outlook Eblast template
  - Developed Monthly Topline Eblast summary of the Job Outlook and disseminated eblast to approximately 12,000 WIB Cohorts and Ventura County Businesses each month. (7) Completed to date, (2) to come.
- **Various Eblasts**
  - **MRVC Annual Meeting Eblast** – Designed and disseminated two eblast invitations targeting 1,900 manufacturers in Ventura County. Average 10% open rate.
  - **WIB Award Nomination Eblast** – Designed and disseminated one call for nominations eblast targeting approximately 12,000 WIB cohorts and Ventura County Businesses. Average open rate 9.4%
- **KCLU General Outreach PSA's** – Develop PSA's and online banners as needed to support promote WIB goals in employer, job seeker and youth outreach over 10 months.
- **General Outreach – Other New Elements Developed in Addition to Those Outlined Above**
  - 2015 WIB Award Logo & Nomination Form
  - State of the Region Report – WIB Sponsor Ad

### **General Outreach – WIB/WDB Transition Materials In Development to be Completed by 6/30**

- **WIB** – WDB Identity package.
- **Digital Media** – Review current WIB websites for WDB transition updates where needed.
- **Case History Poster Template** - Redesign
- **Workforce Update** – Eblast redesign
- **Job Outlook** – Eblast Redesign
- **Transition collateral** – Employer, Job Seeker, Youth pamphlets
- **WIA/WIOA** – Develop release and/or op-ed explaining WIB/WDB, WIA/WIOA transition
- **WDB General Services** – Print ad, PSA's





Workforce Investment Board  
Integrated Media Flowchart  
July 2014 - June 2015

Employer  
WIB  
Youth  
Parents  
OJT  
Jobseeker

5/15/15

		Month of										Total	Total Spots	Total P12+ Imp	Total Investment	Total Value	Clicks
		Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June					
Workforce Update Newsletter										New website launch			6		72,000	\$2,120	\$2,120
Job Outlook Newsletter													8		96,000		
Op-Eds					Working Together		Aging Workforce						2		134,316		
Speakers Bureaus					Ventura Chamber	Mrpk Rotary	Ojai, TO, Simi (2), Mrpk	Oxnard	Simi			Lamarillo Noontime Rotary					
Employer Services VCJobswithaFuture																	
Workforce Wednesday		Includes interview/show, 15 :30s, 3 :60s and 2 billboard IDs	Partnerships that make a difference (SHEPE)	Role of preschool in WD	Partnerships that make a difference (Simi Cham)	Hiring a Veteran is good business		Multi-generational workforce	Career Opps in Hospitality	Clean Green Infrastructure	Job Interviews	Hiring Disabled Workforce	10	200	298,000	\$5,680	\$10,550
LA Business Journal		1/2 page 4/C firesale	9/29										1		22,000	\$1,200	\$9,760
SFV Business Journal		1/2 page 4/C value-add											1		6,250	\$0	\$2,425
KCLU-88.3 FM NPR		7x/wk in AM Edition & All Things Considered											43	301	3,139,000	Different PO*	
KCLU Online (value add)			121	127	181	229	191	166	58						54,000		1,073
Makegoods for running youth spot in Nov/Dec							35 makegood :30s									\$262	
VenturaCountyGrowsBusiness (Employer campaign)															1,260,804	\$20,500	\$33,355
Direct Mail to Employers															6,000		
TimeWarner																	
KVTA																	
Pac Coast Biz Times																	
SFVBJ									91	120							
Chambers																	
Facebook																	
Youth Campaign: Look Ahead/VCJobswithaFuture															2,100,700	\$20,500	\$36,056
TimeWarner																	
KCAQ-104.7 FM																	
KXLM-102.9 FM																	
Pandora Digital Radio																	
Facebook																	
Twitter																	
TOTALS														501	7,189,070	\$50,000	\$94,528

\*Agency negotiated annual KCLU agreement for General Outreach on behalf of the WIB. Cost: \$22,575, Value: \$35,690 (158% of cost)

189%



# CA Manufacturing Industries: Employment and Competitiveness (June 2014)

[Learn More!](#)

## WELCOME




Welcome to the Workforce Investment Board of Ventura County!

Workforce development and employer support are imperative for the economic vitality of a community. The Workforce Investment Board (WIB) of Ventura County offers a valuable resource for employers and job seekers to get help when they need it.

We invite you to join us in supporting workforce development for economic vitality in Ventura County.

Sincerely,  
Mike Soules, Chair

## YOUTH CENTER



## WORKFORCE DEVELOPMENT




## EMPLOYMENT SERVICES



## ECONOMIC DEVELOPMENT



## PARTNERS



## NEWS

Workforce Update

Workforce Wednesday

Job Outlook

2015 WIB Awards Nomination Form

VCStar Article

WIB-VC Wins!

## MEETING CALENDAR



# BUILDING OUR FUTURE WORKFORCE

WORKFORCE INVESTMENT BOARD  
855 Partridge Drive • Ventura, CA 93003  
Phone: 805-477-5342 • Fax 805-477-5386  
www.wib.ventura.org



**TO: RESOURCE DEVELOPMENT COMMITTEE**

**FROM: IRIS INGRAM, CHAIR  
RESOURCE DEVELOPMENT COMMITTEE**

**DATE: MAY 21, 2015**

**SUBJECT: RECOMMENDATION THAT THE WORKFORCE INVESTMENT BOARD OF VENTURA COUNTY (WIB) APPROVE A WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) DRAFT TENTATIVE BALANCED BUDGET FOR PROGRAM YEAR JULY 1, 2015. THROUGH JUNE 30, 2016**

## RECOMMENDATION

Recommend that the Workforce Investment Board of Ventura County (WIB) approve a Workforce Innovation and Opportunity Act (WIOA) Draft Tentative Balanced Budget for Program Year 2015-2016.

## BACKGROUND

The Workforce Investment Act (Act) and WIB Bylaws require that the local board develop a budget for the purpose of carrying out the duties and priorities of the local board, subject to the approval of the Board of Supervisors.

Each Program Year (PY), the WIB reviews and approves a preliminary budget, identifying revenues and planned expenditures for the administration of employment and training programs in Ventura County. As necessary information is known (e.g., funding allocations, prior year carry-in funds), the preliminary approved budget is updated by the WIB, reflecting current program needs and recommending new programs/services with available uncommitted funds.

For PY 2015-2016, the annual WIB budget process is unique in that July 1, 2015, is the implementation date for the Workforce Innovation and Opportunity Act (WIOA) and requires continuing transition activities from WIA to WIOA. As of today's date, Federal WIOA regulations are not finalized, the State has not insured their local area WIOA mandates, and WIOA Adult, Dislocated Worker, Youth and Rapid Response local area allocations are pending. Because of these reasons and the necessity of having an approved budget with which to begin the fiscal year, WIB staff recommend approval of a draft preliminary budget plan to commence expenditures, noting that budget updates will occur on the basis of new information.

At the May 13, 2015 meeting, Resource Development Committee (RDC) members reviewed a working draft of a preliminary WIOA budget plan for 2015-2016 which reflected positive or negative balances in the funding categories with considerations of the following assumptions:

- Program Year 2014-2015 Adult, Dislocated Worker (DW), Youth and Rapid Response allocations are listed for planning purposes, pending publication of PY 2015-2016 grant allocations. Note: PY 2015-2016 DW, Adult, and Youth allocations were published after the RDC meeting and listed on the draft tentative balanced budget.
- The State approved an extension of the Workforce Accelerator Fund (WAF) Project Grant program through September 30, 2015.



- Management Reserve funds will be maintained/reduced to 6.5%.
- Estimated projections are on the basis of PY 2014-2015 carry-in Adult, Dislocated Worker, and Youth funds.
- A 2% approximate increase is estimated for Community Services Department/WIA and WIB Administration salaries and benefits.
- Adult and Dislocated Worker training funds designated for ITA/Education are budgeted at 25% of combined Adult and Dislocated Worker allocations. Note: Training funds were reduced to minimum required 20% and listed on the draft tentative balanced budget.
- County of Ventura overhead/administration cost is expected to continue at \$6,917 net cost.
- Final Kiosk and VCWIB Regional Labor Market Reports costs will occur in PY 2014-2015.
- Prospective contracts for youth services, business services, and outreach will be at the original 2014-2015 procurement levels.

Considerations for discussion and approval of the plan:

- The WIB must approve a preliminary budget plan to authorize expenditures against WIOA funds as of July 1, 2015.
- The year-end close in July 2015 will confirm the amount of 2014-2015 rollover in each of the funding categories.
- The WIB usually makes adjustments to the preliminary budget plan following the year-end close (August or October, depending on the circumstances).
- The WIB could decide to make a mid-year budget plan adjustment, with corresponding changes in authorized expenditures for the remainder of the year (e.g., reduce WIOA programs and services and/or reduce costs for other WIB initiatives).
- The California WIB approved seven additional performance measures for local WIBs that could have an additional impact on program, staff, and/or administrative costs.
- Final Department of Labor and State Workforce Investment Opportunity Act (WIOA) mandates will be issued during PY 2015-2016, and which are expected to have a significant impact on WIOA operation in Ventura County.
- Adjustments by the WIB usually are recommended to the WIB by the Executive Committee, which usually receives recommendations from the Resource Development Committee.

## DISCUSSION

Following a thorough discussion, the Resource Development Committee approved the proposed action to recommend a preliminary budget to the Executive Committee and to the WIB—with the stipulation that the budget be balanced and titled “draft tentative balanced budget” before submission for approval.

With Executive Committee approval, the WIB will recommend action on the 2015-2016 Workforce Innovation and Opportunity Act (WIOA) Draft Tentative Balanced Budget Plan at their meeting on June 18, 2015.

If you have questions or need more information, please call me at (805) 477-5306, or contact Theresa Salazar Vital at (805) 477-5343, email [theresa.vital@ventura.org](mailto:theresa.vital@ventura.org).

2015 - 2016

FY 2015-16 WIOA DRAFT TENTATIVE BALANCED BUDGET PLAN								
		Dislocated Worker	Adult	Youth	Rapid Response	WAF Project	FY 15-16 Plan	FY 14-15 Projections as of May 7
Revenue Projection:								
FY15-16 Grants(W <sup>SIN</sup> 14-53 allocations/RR pending)		2,342,693	1,791,031	1,956,058	396,711		6,486,493	6,634,323
FY15-16Mgmt Reserve: -6.5%		(152,275)	(116,417)	(127,144)			(395,836)	(440,385)
Balance rolled over from prior year grants:							-	-
FY14-15 Mgt Reserve		190,783	119,540	130,062		-	440,385	527,336
Additional rollover - Salaries Savings/(Overage)		70,000	5,000	5,000		-	80,000	293,500
Overhead Saving/(Overage)		-	-				-	15,967
FY 14-15 Unspent Contracts/Misc		29,780	15,800	25,230		37,640	108,450	241,730
ITA/OJT Committed in FY14-15 spent in FY15-16		80,000	30,000				110,000	250,000
Total Available Grants to to be Spent		2,560,981	1,844,954	1,989,206	396,711	37,640	6,829,492	7,522,471
Grants %		37.5%	27.0%	29.1%	5.8%	0.6%	100.0%	
CSD FTEs Assigned to the programs		13.20	9.80	2.00	2.00	-	27.00	
% Direct FTES Allocated to Grants		48.9%	36.3%	7.4%	7.4%	0.0%	100.000%	
% Admin Staff Allocated to Grants		37.5%	27.0%	29.7%	5.8%	0.0%	100.000%	
Expenditure Projection:								
Salaries and Benefits:							-	
CSD 2,600,000		1,271,111	943,484	192,593	192,813	-	2,600,000	2,508,000 96%
WIB Administration (\$866,116) 870,000		326,240	234,796	258,197	50,766	-	870,000	866,116 100%
Subtotal Salaries and Benefits		1,597,351	1,178,280	450,790	243,579	-	3,470,000	3,374,116 97%
Direct Expenses:							-	
Grant Specific Contracts								
EDC-VC Business Services					95,000	-	95,000	95,000 100%
Boys and Girls Club: Core Program				475,000			475,000	523,300 110%
Pathpoint: Core Program				475,000			475,000	523,300 110%
VACE Core Program				260,000			260,000	308,300 119%
Special Projects						-	-	-
Subtotal - Contracted Program Expense		-	-	1,210,000	95,000		1,305,000	1,449,900 111%
Client Expenses:							-	
ITA / OJT (25% required - 10% leverage)		468,539	358,206				826,745	1,043,085 126%
ITA / OJT Committed in 14-15 to be spent in 15-16		80,000	30,000				110,000	250,000 227%
Others/ChildCare/Trans - JTA		46,000	20,000	-			66,000	162,128 246%
Universal Clients (now charged in oh/admin)		-	-	-			-	-
Subtotal - Client Expense		594,539	408,206	-	-	-	1,002,745	1,455,213 145%
Other Allocated/Contracted Expenses							0%	-
Geographic Solutions 0		-	-	-	-	24,000	24,000	24,828 103%
WAF Grant Facilitator 30,000						11,000	11,000	58,616 533%
Outrch/Mktg: theAgency 125,000		35,000	18,000	62,000	10,000	-	125,000	200,000 160%
Outreach -WIB 30,000		11,415	8,104	8,738	1,743	-	30,000	30,000 100%
WIB Expense - Non Staff 20,000		7,610	5,403	5,825	1,162	-	20,000	20,000 100%
Program Outreach-CSD (\$40,073) 30,000		11,415	8,104	8,738	1,743		30,000	40,073 134%
Kiosk		-	-	-	-	-	-	5,000
VCWIB Regional Labor Market Reports							-	20,963
Subtotal - other allocated expense 235,000		65,440	39,612	85,301	14,647	35,000	240,000	399,480 166%
Subtotal- Program/Clients Expenses		659,979	447,818	1,295,301	109,647	35,000	2,547,745	3,304,593 130%
Total Direct Program Expense		2,257,330	1,626,098	1,746,091	353,226	35,000	6,017,745	6,678,709 111%
Overhead/Administration:		38%	27%	30%	5.37%	0.08%	100.00%	0%
Communication/Voice/data 75,000		28,133	20,266	22,512	4,027	61	75,000	75,000 100%
Insurance 19,725		7,399	5,330	5,921	1,059	16	19,725	19,725 100%
Facilities Maint. 89,000		33,385	24,049	26,714	4,779	73	89,000	89,000 100%
Membership and dues 12,000		4,501	3,243	3,602	644	10	12,000	12,000 100%
Education allowance 5,000		1,876	1,351	1,501	268	4	5,000	5,000 100%
Indirect cost recovery(County A87) 6,917		2,595	1,869	2,076	371	6	6,917	6,917 100%
Books and Publication 3,000		1,125	811	900	161	2	3,000	3,000 100%
Office Equip./Supp. & Furniture/Fixtures<5000 (\$44,020) 26,000		9,753	7,026	7,804	1,396	2,000	27,979	44,020 157%
Mail Center - ISF 5,000		1,876	1,351	1,501	268	4	5,000	5,000 100%
Purchase Charges - ISF 4,000		1,500	1,081	1,201	215	3	4,000	4,000 100%
Copy Machine - ISF 15,000		5,627	4,053	4,502	805	12	15,000	15,000 100%
Stores - ISF 300		113	81	90	16	0	300	300 100%
Information Tech - ISF 5,000		1,876	1,351	1,501	268	4	5,000	5,000 100%
Computer Services Non ISF 25,000		9,378	6,755	7,504	1,342	20	25,000	25,000 100%
Building Lease/Rental 85,000		31,885	22,968	25,513	4,564	69	85,000	85,000 100%
Storage Charges - ISF 5,000		1,876	1,351	1,501	268	4	5,000	5,000 100%
Mileage Reimb. - Staffs only 25,000		9,378	6,755	7,504	1,342	20	25,000	30,000 120%
Conference/Seminars:Staffs 15,000		5,627	4,053	4,502	805	12	15,000	23,000 153%
Conference and Seminars - WIB Staffs 20,000		7,502	5,404	6,003	1,074	16	20,000	20,000 100%
Misc. Travel - Staffs only 15,000		5,627	4,053	4,502	805	12	15,000	15,000 100%
Fiscal/HR/BTD/ET (HSA) 350,000		131,127	94,576	105,055	18,794	286	349,838	350,000 100%
Other Admin Services 4,000		1,500	1,081	1,201	215	3	4,000	6,793 170%
Subtotal Overhead 809,942		303,657	218,860	243,110	43,492	2,640	811,759	843,755 104%
		-	-	-	-	-	-	
Planned Total Grant Expenses		2,560,987	1,844,958	1,989,201	396,718	37,640	6,829,504	7,522,464 110%
Admin Rate for State Reporting		8%	8%	8%	7%	1%	8%	
Admin Rate (State Reported + Other)		12%	12%	12%	11%	7%	12%	