



WORKFORCE DEVELOPMENT BOARD OF VENTURA COUNTY

EXECUTIVE COMMITTEE MEETING

Thursday, March 14, 2019
8:00 a.m. - 9:30 a.m.

United Food and Commercial Workers, Local 770 (UFCW)
816 Camarillo Springs Road (Meeting Room/Suite A), Camarillo

AGENDA

- | | | |
|-----------|---|----------------|
| 8:00 a.m. | 1.0 Call to Order and Agenda Review | Gregory Liu |
| 8:02 a.m. | 2.0 Public Comments
<i>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.</i> | Gregory Liu |
| 8:05 a.m. | 3.0 WDB Chair Comments | Gregory Liu |
| 8:10 a.m. | 4.0 Consent Items
4.1 Approve Executive Committee Minutes: January 10, 2019 and February 14, 2019
4.2 Receive and File: WDB Committees Meetings Updates/Reports | Gregory Liu |
| 8:15 a.m. | 5.0 Financial Report and Committee Discussion <ul style="list-style-type: none">Financial Status Report: January 2019 | Bryan Gonzales |
| 8:30 a.m. | 6.0 Economic Development Collaborative: <ul style="list-style-type: none">Performance Report PY 2018-2019: Business Retention and Rapid Response ActivitiesUpdate: Regional Plan Implementation 1.0 | Bruce Stenslie |
| 8:45 a.m. | 7.0 Action Items
7.1 Recommendation that the Executive Committee Recommend to the Workforce Development Board of Ventura County (WDB) the Approval and Recommendation to the Board of Supervisors to Approve a Contract with the Economic Development Collaborative (EDC), to Provide Business Retention – Layoff Aversion Services from July 1, 2019 through June 30, 2020, in the Amount of \$95,000 in WIOA Funds, Under RFP #1718.02, Released on August 28, 2017 and Closed on September 25, 2017 (RFP attached) | Rebecca Evans |

7.2 Recommendation that the Executive Committee Recommend to the Workforce Development Board of Ventura County (WDB) the Approval and Recommendation to the Board of Supervisors to Approve the Obligation of \$90,000 in PY 2019-2020, California Workforce Development Board (CWDB) Regional Plan Implementation Funds to the Economic Development Collaborative, to Augment and Support Existing Local Economic Development Efforts Related to Business Retention and Layoff Aversion Services As Defined by the CWDB Implementation Design

Rebecca Evans

7.3 Recommendation that the Workforce Development Board of Ventura County (WDB) Recommend County Board of Supervisors Approval of the Ventura County Workforce Innovation and Opportunity Act (WIOA) Regional and Local Workforce Development Plans Update for Program Years 2017-2021 – Two Year Modifications

Rebecca Evans

9:05 a.m. **8.0 WIOA Workforce Development**

Patrick Newburn

- WIOA Performance Indicators Q2 Reports for PY 2018-2019

9:15 a.m. **9.0 WDB Administration**

- WDB/WIOA Grants Update
 - Prison to Employment

Patrick Newburn

- WDB Membership Update

Rebecca Evans

- WDB Administration Manager Position Update

Rebecca Evans

- Proposed Workforce Development and Executive Committee Meetings Schedule for Program Year 2019-2020 (*Meeting dates for Executive Committee & WDB will be presented as a Consent Item for the April 11 Executive Committee Meeting*).

Rebecca Evans

- California Workforce Association Updates

Rebecca Evans

- Day at the Capitol
- Board of Director's Meeting

- On the Calendar

Rebecca Evans

March 18, 2019

Congressional Visit of the AJCC

Meeting with Congressman Salud Carbajal

America's Job Center of California

2901 N. Ventura Road, 3rd Floor, Oxnard CA

March 23-27, 2019

The Forum 2019

National Association of Workforce Boards

The Washington Hilton, Washington, D.C.

9:25 a.m. **10.0 Committee Member Comments**

Committee
Members

9:30 a.m. **11.0 Adjournment**

Gregory Liu

Next Meeting

April 11, 2019 (8:00 a.m.-9:30 a.m.)

United Food and Commercial Workers, Local 770

816 Camarillo Springs Road, Camarillo, CA

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

For information about the Workforce Development Board of Ventura County, go to www.workforceventuracounty.org



WDB Executive Committee Meeting

Thursday, January 10, 2019

8:00 a.m. - 9:30 a.m.

United Food and Commercial Workers, Local 770 (UFCW)
816 Camarillo Springs Road (Meeting Room/Suite A), Camarillo

MINUTES

Meeting Attendees

Executive Committee

Gregory Liu (WDB Chair)
Brian Gabler
Alex Rivera
Patty Schulz
Tony Skinner
Jesus Torres

WDB Administration

Rebecca Evans,
Executive Director
Talia Barrera
Patricia Duffey
Tracy Johnson
Patrick Newburn
Ma. Odezza Robite

Guests

Nancy Ambriz (WIOA Programs)
Bryan Gonzales (HSA Fiscal CFO)
Heidi Hayes (theAgency)
Melissa Livingston (HSA Chief Deputy)
Samantha Tobin (Linkedin)
Christopher Vega (HSA Fiscal)
Joey Zumaya (Linkedin)

1.0 Call to Order and Agenda Review

Gregory Liu called the meeting to order at 8:04 a.m. No changes were made to the agenda.

2.0 Public Comments

No public comments.

3.0 WDB Chair Comments

Chairman Gregory Liu welcomed the attendees and introduced to the Committee the new WDB Executive Director Rebecca Evans.

Rebecca Evans thanked everyone for attending and appreciates the opportunity of becoming the Executive Director of the Workforce Development Board of Ventura County. Ms Evans got to know most of the committee members by way of her immediate past role with the Humans Services Agency (HSA) working directly with Nancy Ambriz with the WIOA Title I services program. Ms Evans was the Senior Manager of the HSA/Adult Family Services providing oversight of the WIOA Program, Homeless Services, Veterans Services, RAIN Transitional Living Center, and the Homeless Management Information System. Prior to that Ms. Evans worked at Many Mansions an affordable housing provider in Ventura County and years prior she worked as the executive director of Ventura County Civic Alliance this is what sparked her interest and work in workforce development. Ventura County Civic Alliance (VCCA) looks at economy, social equity, and environment of Ventura County and is focused on measuring quality of life at indicators through the State of the Region Report. Ms. Evans worked with many of people at that time whom were a part of the WDB, specifically former WDB Executive Director Cheryl Moore and member of the VCCA Workforce Education team, and Tracy Perez as VCCA Chair of the Workforce Education Committee and now WDB Vice Chair. After that, she worked at the County Behavioral Health

Department doing workforce education and training under Prop 63 Mental Health Services Act. In that role, she was working to grow the department's future professionals in mental health. Ms. Evans plans to set time aside as a board to look at the regional plan, strategic plan, priorities, and committee structure for the WDB. Melissa and Rebecca will be setting up times to meet with each member at their convenience to hear what their priorities, interests, and engagement are. Additionally, what the HSA and WDB can do as a collective organization. A big priority will be growing partnerships with the business, education, and service community. By bringing those three together the WDB will be able to do the most to assist those needing workforce development, job seekers services, and the employers that need a ready and able workforce. Ms. Evans thanked the committee for the opportunity to say a few words and looks forward to working with the WDB Administration team.

4.0 Consent Items

4.1 Approve Executive Committee Minutes: November 8, 2018

4.2 Receive and File: WDB Committees Meetings Updates & Reports

Motion to approve the Consent Items: Gregory Liu

Second: Alex Rivera

Motion carried.

5.0 Financial Report and Committee Discussion

Chief Financial Officer Bryan Gonzales, from HSA Fiscal, presented the Financial Status Report (FSR) for Fiscal Year 2018-2019, reflecting year-to-date expenditures from July 1, 2018 through November 30, 2018 (42% into the Fiscal Year).

2018-2019 WIOA Budget Plan Expenditures

The Committee reviewed and discussed the Financial Status Report (FSR) for Fiscal Year 2018-2019, reflecting year-to-date expenditures from July 1, 2018 through November 30, 2018.

The status of expenditures at 42% into the fiscal year was:

<u>WIOA Core Funds</u>	<u>2018-2019 Plan</u>	<u>YTD Expended</u>	<u>% Expended vs. Plan</u>
Dislocated Worker	2,170,275	824,410	38%
Adult	1,884,570	683,307	36%
Youth	1,707,076	609,115	36%
Rapid Response	294,918	131,594	45%
 <u>WIOA Non-Core Funds</u>			
High Performing Board	54,838	36,943	69%
CWDB Regional Capacity Bldg.	187,254	116,853	32%
Regional Organizer	15,186	8,517	56%
Workforce Accelerator 6.0	236,512	56,481	24%
Regional Plan Implementation	258,305	112,741	44%
Prison to Employment	47,500	-	0%

High Performing Board: Pursuant to California Unemployment Insurance Code (CUIC) Section 14200(c), the California Workforce Development Board (State Board) has established standards for certification of high-performing Local Workforce Development Boards (Local Board). CUIC Section 14200(d) requires a portion of the Governor's discretionary fund to be made available for the purpose of providing incentives to high-performing Local Boards. Term 12/1/2016 – 12/31/2018.

CWDB Regional Capacity Building/ Regional Training Coordinator: Focuses on the professional development of staff and partners in the One-Stop System. Plan and implement regional and statewide trainings identified in the Statewide Training Plan. Implement a skill gap analysis for workforce professionals, identifying training priorities and developing ongoing training and capacity-building initiatives. Multiple program year grant term 3/1/2017 – 3/31/2019.

Regional Organizer: Funds to augment our continuing support for regional organizing and regional plan implementation. The WDBVC will support efforts for program alignment across core programs and will all mandatory partners. Regional Organizing activities in Ventura County will help facilitate the importance of fostering demand-driven skills attainment; enabling upward mobility for all; and aligning, coordinating and integrating workforce development programs. Multiple program year grant term 3/1/2017 – 3/31/2019.

Workforce Accelerator 6.0: STEPS Connection does not enroll participants, however; it seeks to strengthen partnerships to create an integrated and responsive "One-Stop" support services system; develop tools/resources to strengthen participation and employment outcomes; conduct a support service gap analysis; and develop a "best practice" guide. Program year grant term 2/1/2018 – 7/31/2019.

Regional Plan Implementation: Assists with WDBVC support leadership structures, improve staff capacity and training, strengthen sector initiatives, more fully integrate career services offered by AJCC partners, and help to build sustainable investments. Subcontracts awarded the Agency and to EDC-VC. Program year grant term 1/1/2018 – 6/30/2019.

Prison to Employment Initiative (P2E): Planning Grant Round 1 awarded \$47,500; Direct Services Grant Round 2 (implementation of plan) to be submitted on 2/15/19. Ventura Regional Plan to provide employment and supportive services to formerly incarcerated and justice-involved individuals. Emphasis on regional coalition with employers, labor, CBO's, CDCR, Sheriff, and local agencies. Governor Brown and State legislature funded \$37 million over three-year grant term 10/1/2018 – 3/31/2020.

WIOA Training Expenditures

As shown in the table below, the summary of WIOA training expenditures, as of July 1, 2018 to November 30, 2018, 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 WIOA core grants across the overlapping federal two-year grant cycles.

	Core Grant <u>FY 16-18</u> (Due 10/1/18)	Core Grant <u>FY 17-19</u> (Due 10/1/19)	Core Grant <u>FY 18-20</u> (Due 10/1/20)
Total Adult and Dislocated Worker Formula Fund Allocations	4,014,468	3,728,337	3,654,508
Training Expenditure Requirement	1,204,340	1,118,501	1,096,352
	30%	30%	30%

Formula Fund Training Expenditures	810,112	701,097	332,979
Leveraged Resources			
• Total Leveraged Resources Used Toward Training Expenditures	460,403	380,348	125,994
• Maximum Allowed Leveraged Resources (10%)	401,447	372,834	365,451
Total Leveraged Resources Used Toward Training Expenditures	401,447	372,834	125,994
• Total Amount Spent on Training	1,211,559	1,118,501	414,403
• % of Training Requirement Met (Final goal = 100%)	101%	100%	30%

Bryan Gonzales presented the financial report summary highlights as shown:

1. FY 2018-19 Financial Status Report – 7/1/18-11/30/18
 - a. Report Period 7/1/18-11/30/18
 - b. 42% through the fiscal year
 - c. Summary Chart – provides a visual view of magnitude of grants and expenditures to date
 - d. Actual to Plan
 - i. Core Grants
 1. Total expenditures are in line in most Core Grants.
 2. Rapid Response Other Operating costs are at 79% of Plan amounts.
 - a. Smaller proportional size of this grant compared to the other core grants can result in significant % swings.
 - ii. Other Grants
 1. Smaller size of the grants can result in fairly significant % swings overall.
 2. Grants have varying contract ending dates.
 - a. Special attention needs to be paid to these ending dates when evaluating grant to date spend percentages.
 3. High Performing Boards (WDB-1080)
 - a. Overall spend to date is at 69% of Plan.
 - 9 On track to fully spend grant balance by 12/31/18 end date.
 4. Regional Capacity Building (AFS-1087; 1090)
 - a. Overall spending has been increased since last report.
 - b. Salaries and Benefits are now at 74%. This amount contains adjustments from prior fiscal year.
 - c. Direct Program costs are at 27%.
 - 9 Current YTD amount includes \$3.5K of expenditures on VOS Greeter Project.
 - 10 Training totaling approximately \$19K to commence January 2019 which will increase these costs.
 5. Regional Organizer (WDB-1089)
 - a. Previous YTD reports based on initial Plan (approved 5/2018) did not include funds for this fiscal year. FY 18/19 Plan was updated to include unspent prior year funds.
 - b. Continuing to work with Program to monitor spend, especially with Salaries and Benefits.
 6. Workforce Accelerator 6.0 (AFS-1117)
 - a. Plan total amounts is at 24%.

- b. Program services for STEPS-Youth program associated with this grant continue to be ramped up.
 - c. Direct Program/WIOA amounts is at 0%
 - 9 Contract of approximately \$65K for consultant to provide tools, resources, and facilitation of stakeholder meetings in process.
 - 10 Will continue to work with Programs to ensure grant funds are fully utilized.
 - 7. Regional Plan Implementation (WDB-1122)
 - a. Overall spend to Plan percentage is 44%
 - b. Direct Program costs are at 46%. Program staff will continue to work with EDC-VC and The Agency to monitor spend to agreement amounts.
 - e. Paid & Accrued – provides the breakout of actual paid and accrued expenditures
 - f. Training Report
 - i. 17-19 Grants (Due 10/1/19)
 - 1. 100% of training requirement met as of 11/30/18.
 - 2. Have until 6/30/19 to meet this requirement.
 - ii. 18-20 Grants (Due 10/1/20)
 - 1. 38% of training requirement met as of 11/30/18.
 - 2. Have until 6/30/20 to meet this requirement.
- 2. FY 2018-19 WIOA Budget Plan (Proposed for Executive Committee Meeting 1/10/19) – Year to Date Expenditures
 - a. 2018 Mega Wildfires NDWG grant awarded 12/26/18 with a contract period of 12/6/18-12/31/20.
 - b. Prison to Employment – Contract effective 10/1/18-3/31/20.
 - c. Row 24 EDC-VC Business Services – Budgeted and YTD Spend Amount includes prior year invoices that were not included in FY 6/30/18 accruals.
 - d. Row 31 ITA/OJT – This fiscal year, low training expenditures will be addressed in part with a shift of \$100,000 from Dislocated Worker to Adult where there is higher demand. Current FY 18/19 training expenditures first applied to line 32, “FY 17/18 ITA/OJT Committed 17/18 Spent in 18-19”, with the balance applied to Line 31, “ITA/OJT (30% required-10% leverage)”.
 - e. Row 39 Outreach/Marketing: theAgency – theAgency has amended its contract to include services for the Regional Plan Implementation. Reported amount is consistent with expectations and will continue to be monitored.
 - f. Rows 49-69 – Variances among these various expenditure categories is common, especially in categories with relatively small expenditure levels.
 - i. Row 55 Books and Publications – Includes purchase of “The Job Hunting Handbook” from Dahlstrom and Company. Confirmed with Programs this is expected.
 - g. Row 66 Conferences and Seminars WDB Staff – Does not include “grant specific” travel that has been moved to row 40. Fiscal staff reviewing financial records to determine whether any of these charges can be moved to other categories/grants.

Bryan Gonzales reported on the FY 2018-19 WIOA Budget Plan Update (Draft for WDB Executive Committee Meeting 1/10/18) with the following Budget Assumptions:

- 1. Line 1 - WDB was not awarded the \$400K contract for Steps to Work (AB2060) (6/12/18)
- 2. Lines 3-11 - Grant balances rolled over from FY17-18 are final amounts (9/11/18)

3. Line 10 - \$100K fund transfer from Dislocated Worker to Adult is included in ITA/OJT committed in FY17-18 but spent in FY18-19
4. Lines 18 and 19 - Salaries are based on CEO Salary Forecast, 26.7 FTEs for AFS assuming 24 filled + 2 to be filled, and .7 fixed-term; 6.75 FTEs for WDB assuming 6 filled + Exe. Director to be filled for 6 months.
5. Line 24 - EDC-VC contract updated to reflect current year contract as well as unspent FY 17/18 funds that will be spent FY 18/19 (1/2/19)
6. Other cost changes are based on projected actual need
7. Line 62 - Conference/Seminars - AFS Staffs reduced by \$3K (5/3/18)
8. Line 63 - Conference and Seminars - WDB Staffs reduced by \$10K (5/3/18)
9. All other services and overhead costs are at FY17-18 levels
10. Updated with Prison to Employment (P2E) information (12/6/18)
11. Updated with 11/19/18 WSIN 18-13 award amounts (11/23/18)
12. Updated with actual YTD through November expenditures (12/31/18)
13. 2018 Mega Wildfire NDWG awarded 12/26/18. Plan will be updated once more information becomes available (1/2/19)

Committee members took note to the \$1.6 million reduction change in core funding from FY 17-18 to FY 18-19 budget plan and will continue to keep an eye moving forward.

Bryan Gonzales additionally reported one of the steps fiscal will be taking that will make more sense on the budget report is that when grant funding comes in, fiscal will come to the WDB for board approval. If/when it does happen fiscal will update the budget plan and come to the board with a draft update version. In the past practice, fiscal waited to make updates because the WDB requested to review the budget prior to final updates and determine how the monies were to be spent according to the grant and provide feedback. However, the fact the grants themselves are actually approved when funding comes in the budget plan itself has dollar amounts and spending spread across all the grants and that information is used to split out other costs until they get more accurate information and update as they go along.

6.0 Action Items

The Executive Committee considered background information, asked questions, and discussed the following items before taking action. The meeting packet with background information on the action items on the WDB website: www.workforceventuracounty.org.

6.1 Request the Executive Committee to Approve the Procurement of Services of the California Workforce Association (CWA), in the Amount of \$10,000 to Re-procure the One-Stop-Operator to Provide Coordination of the Delivery of Services by the America's Job Center of California (AJCC) and Partner Network for Ventura County and Approve a Budget Amount Not to Exceed \$15,000 to be Included in the Request for Proposal (RFP) for Support of the Actual Work of the Selected One-Stop-Operator

Melissa Livingston HSA Chief Deputy Director presented the action item to the committee referencing a State Employment Development (EDD) monitoring from 2017- where a determination was made that the Ventura County One Stop Operator procurement was a "failed procurement", based upon perceived lack of sufficient firewalls and a bidding process that supported a consortium approach excluding a single entity from competing for the contract award, and offering no financial incentive to prospective bidders. The State provided instruction that in order to address the failed procurement status and provide for a response to the monitoring corrective action plan a re-procurement of the services should occur by June 30, 2019.

Ms Livingston shared the recommended approach to be responsive to the findings of the EDD monitoring and most specifically to address firewall and open competition requirements to outsource to a third party the Request for Proposal (RFP) process for the One-Stop Operator (OSO); leveraging the services of the California Workforce Association (CWA). CWA has a long history with workforce programs and services, and has procured the OSO services in California for a number of other regions. Ms Livingston also recommended that the Committee approve payment not to exceed \$10,000 to CWA to perform the procurement services, and include in the RFP an amount not to exceed \$15,000 for the actual services of the OSO.

Motion to approve: Tony Skinner

Second: Alex Rivera

Motion carried unanimously.

6.2 Recommendation that Executive Committee of the Workforce Development Board of Ventura County (WDB) Ratify the Submission of a \$2,400,000 Grant Application by the WDB to the California Employment Development Department (EDD) for the 2018 California Mega Wildfires National Dislocated Worker Grant

Executive Director Rebecca Evans informed the committee today's action item is one that WDB applied for before with the Thomas Fire in 2017. However, this is new money with the recent disaster that was declared in Ventura County and it's to provide temporary employment and workforce development services for dislocated workers. If there is not a number of dislocated workers, it goes into the long term unemployed. Ms. Evans shared the WDB will be working in partnership with Goodwill Industries and the Foundation for California Community Colleges' Career Catalyst program to be the employer of record and Goodwill to provide the selection of work sites and the oversight of the job sites. The Title I WIOA Program will be providing technical assistance for Goodwill. Ms. Evans added we are pursuing this grant because it seems prudent to do it given the needs that are here locally. It still remains to be seen while we have potential employers and job seekers identified its whether we will have the number of people qualified ready and willing to do this type of recovery work in those sites.

Motion to approve: Tony Skinner

Second: Alex Rivera

Motion carried unanimously.

6.3 Recommendation that Executive Committee of the Workforce Development Board of Ventura County (WDB) Ratify the Submission of a \$500,000 Grant Application by the WDB to the California Employment Development Department (EDD) and the California Workforce Development Board (CWDB) for a 2018-19 Veteran's Employment-Related Assistance Program Grant (VEAP)

Rebecca Evans presented action item requesting committee ratify the submission of the VEAP grant which came out the week of Thanksgiving 2018 with a submission deadline of December 28, 2018. The HSA/Adult and Family Services department helped write and put everything together. The WDB had this grant funding in 2011 and it was successfully executed. This grant is to assist 55 veterans in Ventura County with workforce development services and is a unique opportunity to serve veterans with disabilities.

Motion to approve: Tony Skinner

Second: Alex Rivera

Motion carried unanimously.

6.4 Recommendation that the Executive Committee of the Workforce Development Board of Ventura County (WDB) Approve on behalf of the WDB the Submission of a Grant Application to the California Employment Development Department (EDD) and the California Workforce Development Board (CWDB) for the Prison to Employment Initiative Direct and Supportive Service Grant

Rebecca Evans informed the committee this grant application is to assist justice-involved individuals coming out of prison under supervision who need workforce development services. The state is very proud of this initiative because it is a statewide partnership between the CA Department of Corrections and Rehabilitation, EDD, and labor to train and support those in our community that need job skills and readiness and employment services. Our justice-involved are formerly incarcerated, those under supervision and those that have had infractions. Ms. Evans report several WDB members attended recently held stakeholder meetings.

Motion to approve: Tony Skinner

Second: Alex Rivera

Motion carried unanimously.

7.0 LinkedIn Presentation: Ventura County Workforce Report, presented by Joey Zumaya leader of the public sector team in North America.

Chairman Liu introduced and welcomed Mr. Zumaya to the committee. Joey Zumaya shared he has had the privilege of working with thousands of government agencies and now hundreds of workforce boards across the nation. The genesis of the report is how LinkedIn Economic Insights and LinkedIn Learning can benefit all of the boards across the nation. Mr. Zumaya shared he has exciting work with the National Workforce Development Board (NAWB) Washington, D.C., the California Workforce Association (CWA), Sacramento, CA and Florida's CareerSource.

Talia shared that they have been talking with LinkedIn Learning for months and this is an in-kind contribution. They are not charging the board and not seeking any other type of compensation it's just in-kind, one of the reason they wanted to partner with us is because they are our neighboring county. The presentation will be taken to our WDB in February. If the board would like to go in more detail and need more information, they can discuss a partnership in the future.

8.0 WDB Administration

- WDB/WIOA Grants Update

Rebecca Evans provided a brief review. Several grants are covered in action items. The committee is welcome to follow up with staff should have any questions about the grants. Recently grant requests for proposals have arrived with very short deadlines. In the future, we seek to bring the proposals to the board with enough time for review and approval rather than having the committee ratify them after the fact. The Prison to Employment submission is due February 15.

- WDB Regional and Local Plans PY 2017-21 – Two Year Modification Update

Rebecca Evans provided an update. WDB hired a consultant, Ken Barnes, who is helping WDB Admin facilitate the regional plan update that is due March 15, 2019. This is to ensure that we locally are participating in activities that comply with WIOA. We are working closely with Child Support Recovery Services and those who received eligibility benefits such as CalFresh. Making sure we are working with those who are on CalWORKS receiving CalFresh, those who are disabled, those who are justice-involved, those who are veterans, and other populations within our county that need workforce development services.

- On the Calendar
 - CWA Youth@Work 2019:
Will be held at the Hilton Long Beach CA from January 22-24, 2019. Attendees are WDB member Jaime Mata, WDB staff Patricia Duffy, and Edward Sajor from the STEPS Program.
 - WDB Local and Regional Plan Modification Meeting:
Will be held on January 31, 2019 at the America's Job Center of California (AJCC), 2901 N. Ventura Road (3rd Fl., Ventura Room), Oxnard, from 6:00 p.m. to 7:00 p.m. This is a public stakeholder meeting held in the evening as a requirement in order to have more members of the community who might be able to come after work to provide comments and we are able to put that into our regional plan.

WDB Meeting (2018-19 WDB Awards)
February 28, 2019 (8:00 a.m. – 10:00 a.m.)
Ventura County Office of Education
5100 Adolfo Road (Salon C), Camarillo
 - NAWB Forum 2019
March 23-27, 2019
National Association of Workforce Boards
The Washington Hilton, Washington, D.C.

9.0 Committee Member Comments

No member comments were made.

10.0 Adjournment

Motion to adjourn at 9:35 a.m.: Alex Rivera
Second: Tony Skinner
Motion carried

Next Meeting
February 14, 2019 (8:00 a.m.-9:30 a.m.)
United Food and Commercial Workers, Local 770
816 Camarillo Springs Road (Meeting Room), Camarillo



WDB Executive Committee Meeting
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8:00 a.m. - 9:30 a.m.

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MINUTES

Meeting Attendees

Executive Committee

Gregory Liu (WDB Chair)
Tracy Perez (WDB Vice Chair)
Vic Anselmo
Greg Barnes
Anthony Mireles
Alex Rivera
Patty Schulz
Jesus Torres

WDB Administration

Talia Barrera
Rebecca Evans
Patrick Newburn
Ma. Odezza Robite

Guests

Bryan Gonzales (HSA Fiscal)
Melissa Livingston (HSA Chief Deputy
Director)
Christopher Vega (HSA Fiscal)

1.0 Call to Order and Agenda Review

Gregory Liu called the meeting to order at 8:05 a.m. No changes were made to the agenda.

2.0 Public Comments

No public comments.

3.0 WDB Chair Comments

Gregory Liu welcomed the attendees.

4.0 Consent Items

4.1 Receive and File: WDB Committees Meetings Updates/Reports

The members agreed that the minutes from the January 10 meeting will be approved at the next month's meeting.

5.0 Financial Report and Committee Discussion

Bryan Gonzales, from HSA Fiscal, presented the Financial Status Report (FSR) for Fiscal Year 2018-2019.

2018-2019 WIOA Budget Plan Expenditures

The Committee reviewed and discussed the Financial Status Report (FSR) for Fiscal Year 2018-2019, reflecting year-to-date expenditures from July 1, 2018 through December 31, 2018.

The status of expenditures at 50% into the fiscal year was:

<u>WIOA Core Funds</u>	<u>2018-2019 Plan</u>	<u>YTD Expended</u>	<u>% Expended vs. Plan</u>
Dislocated Worker	2,170,220	988,295	46%
Adult	1,884,520	871,017	46%
Youth	1,707,037	772,394	45%
Rapid Response	294,910	166,730	57%

<u>WIOA Non-Core Funds</u>			
High Performing Board	54,838	54,838	100%
CWDB Regional Capacity Bldg.	187,249	130,794	70%

High Performing Board: Pursuant to California Unemployment Insurance Code (CUIC) Section 14200(c), the California Workforce Development Board (State Board) has established standards for certification of high-performing Local Workforce Development Boards (Local Board). CUIC Section 14200(d) requires a portion of the Governor's discretionary fund to be made available for the purpose of providing incentives to high-performing Local Boards.

CWDB Regional Capacity Building: For the Ventura County WIOA regional plan development and training coordination with the State. Multiple program year grant.

WIOA Training Expenditures

As shown in the table below, the summary of WIOA training expenditures, as of July 1, 2018 to December 31, 2018, indicated appropriate spending against the required Adult/Dislocated Worker training expenditure targets (50% into the fiscal year).

	<u>Core Grant FY 16-18</u>	<u>Core Grant FY 17-19</u>	<u>Core Grant FY 18-20</u>
Total Adult and Dislocated Worker Formula Fund Allocations	4,014,468	3,728,337	3,654,508
Training Expenditure Requirement	1,204,340	1,118,501	1,096,352
	30%	30%	30%
Formula Fund Training Expenditures	810,112	701,097	367,976
Leveraged Resources			
• Total Leveraged Resources Used Toward Training Expenditures	460,403	380,348	126,271
• Maximum Allowed Leveraged Resources (10%)	401,447	372,834	365,451
Total Leveraged Resources Used Toward Training Expenditures	401,447	372,834	126,271
• Total Amount Spent on Training	1,211,559	1,118,501	449,677
• % of Training Requirement Met (Final goal = 100%)	101%	100%	41%

Bryan Gonzales presented the financial report summary highlights as shown:

1. FY 2018-19 Financial Status Report – 7/1/18-12/31/18
 - a. Report Period 7/1/18-12/31/18
 - b. 50% through the fiscal year
 - c. Summary Chart – provides a visual view of magnitude of grants and expenditures to date
 - d. Actual to Plan
 - i. Core Grants
 1. Total expenditures are in line in most Core Grants.
 2. Rapid Response Other Operating costs are at 85% of Plan amounts.
 - a. Smaller proportional size of this grant compared to the other core grants can result in significant % swings.
 - ii. Other Grants
 1. Smaller size of the grants can result in fairly significant % swings overall.
 2. Grants have varying contract ending dates.
 - a. Special attention needs to be paid to these ending dates when evaluating grant to date spend percentages.
 3. High Performing Boards (WDB-1080)
 - a. Overall Plan spend amount has been updated to reflect total grant amount of \$54K.
 4. Regional Capacity Building (AFS-1087; 1090)
 - a. Overall spending has been increased 8 percentage points since last report.
 - b. Salaries and Benefits are now at 83%. This amount contains adjustments from prior fiscal year.
 - c. Direct Program costs remain at 27%.
 - i. Current YTD amount includes \$3.5K of expenditures on VOS Greeter Project.
 - ii. Training totaling approximately \$19K to commence January 2019 which will increase these costs.
 5. Regional Organizer (WDB-1089)
 - a. Continuing to work with Program to monitor spend, especially with Salaries and Benefits.
 - i. Program is working with EDD to prepare a budget modification to fully utilize grant funds.
 6. Workforce Accelerator 6.0 (AFS-1117)
 - a. Overall actual to plan total amounts is at 28%.
 - b. Direct Program/WIOA amounts currently is at 0%
 - i. Contract of approximately \$65K for consultant to provide tools, resources, and facilitation of stakeholder meetings signed and implemented.
 1. First task (to develop workplan) invoiced by CWA January 2019.
 7. Regional Plan Implementation (WDB-1122)
 - a. Overall spend to Plan percentage is 44%
 - b. Direct Program costs are at 52%. Program staff will continue to work with EDC-VC and The Agency to monitor spend to agreement amounts.
 - e. Paid & Accrued – provides the breakout of actual paid and accrued expenditures
 - f. Training Report
 - i. 17-19 Grants (Due 10/1/19)
 1. 100% of training requirement met as of 12/31/18.

2. Have until 6/30/19 to meet this requirement.
- ii. 18-20 Grants (Due 10/1/20)
 1. 41% of training requirement met as of 12/31/18.
 2. Have until 6/30/20 to meet this requirement.
2. FY 2018-19 WIOA Budget Plan (Presented at 1/10/19 WDB Executive Meeting - With High Performance Board Expenditure Update) – Year to Date Expenditures
 - a. Updates to Plan consist of:
 - i. High Performance Board planned expenditure amount has been updated to reflect total grant award amount.
 - ii. Column for 2018 Mega Wildfires NDWG grant totaling \$810K awarded 12/26/18 with a contract period of 12/6/18-12/31/20 will be added for January reporting.
 - b. Prison to Employment – Contract effective 10/1/18-3/31/20. No costs have been incurred as of 12/31/18, however, contract for \$45K in consultant services has been approved and signed.
 - c. Row 26 Boys and Girls Club: Core Program – Historically, costs have been low at the beginning of the fiscal year and increased as the year progresses. Current fiscal year is following this pattern.
 - d. Row 31 ITA/OJT – This fiscal year, low training expenditures will be addressed in part with a shift of \$100,000 from Dislocated Worker to Adult where there is higher demand. Current FY 18/19 training expenditures first applied to line 32, “FY 17/18 ITA/OJT Committed 17/18 Spent in 18-19”, with the balance applied to Line 31, “ITA/OJT (30% required-10% leverage)”.
 - e. Row 39 Outreach/Marketing: The Agency –The Agency has amended its contract to include services for the Regional Plan Implementation. Reported amount is consistent with expectations and will continue to be monitored to contracted amount.
 - f. Rows 49-69 – Variances among these various expenditure categories is common, especially in categories with relatively small expenditure levels.
 - i. Row 55 Books and Publications – Includes purchase of “The Job Hunting Handbook” from Dahlstrom and Company. Confirmed with Programs this is expected.
 - ii. Row 62 Conferences and Seminars WDB Staff – Does not include “grant specific” travel that has been moved to row 40.
 - iii. Fiscal staff reviewed financial records and moved \$5.8K in travel costs to Line 39 “WDB Expense-Non Staff”.
 - iv. Current year spend levels will be considered during consideration of future Plan levels.

With regard to salary and expenses, Rebecca Evans informed the attendees that the WDB Admin Team has started to code hours in payroll time reporting for time study purposes.

With regard to the Regional Organizer topic, one of the committee members asked who is the designated Regional Organizer. The reply was Patricia Duffy is the designated Regional Organizer.

6.0 Action Item

Recommendation to approve the obligation of \$90,000 in 2019-2020, California Workforce Development Board (CWDB) Regional Plan Implementation funds to the Economic Development Collaborative, to augment and support existing local economic development efforts related to business retention and layoff aversion services as defined by the CWDB implementation design work plan.

Funding for this grant will run from April 1, 2019 to October 2020.

Committee members discussed and agreed, before moving forward with this recommendation, to move the item for approval and discussion at the committee meeting on March 12, 2019. Committee members requested to have Bruce Stenslie - Economic Development Collaborative to present at next month's meeting to further explain details regarding this recommendation.

Motion to table this item for next meeting: Anthony Mireles

Second: Greg Barnes

Motion carried

7.0 WDB Administration

- WDB/WIOA Grants Update
Patrick Newburn provided an update on the NDWG grant. One of the committee members asked when was this grant received. Patrick Newburn replied that it was on Dec 24, 2018 when we got the award, and then we were notified in January and then they gave us the money before the awarding in January 2019. Rebecca Evans informed that it was a retroactive date and that December 3 was the official award date. Patrick Newburn commented that it was fluid because of the disaster that happened to Ventura County.
- CWA Youth @Work 2019 Conference Update
WDB Staff member Patricia Duffy and WDB Board member Jaime Mata and WIOA STEPS staff member Edward Sajor attended the CWA Youth Conference. None were present at the Executive Committee meeting to report out on the conference. An update from Jaime Mata is forthcoming.
- Update: WDB Regional and Local Plans PY 2017-21 – Two Year Modifications Meeting
Rebecca Evans provided updates on these items.
- Update: WDB State Requirements
Rebecca provided updates on these items. All items in progress and due June 30, 2019 except AJCC Certification of the affiliate site which is due April 1, 2019
 - Local Board Certification
 - AJCC Operator Selection
 - Career Services Provider
 - MOU Phase I (Comprehensive, Affiliate, and Specialized)
 - MOU Phase II (Comprehensive, Affiliate, and Specialized)
 - AJCC Certification for Affiliate & Specialized

Melissa Livingston shared with the attendees that there is now the presence of WDB Admin Team in the AJCC Riverpark building. This will create a different dynamic on operation and oversight.

One of the committee members thanked Melissa Livingston for the changes. A committee member asked if the Riverpark building is shared with private entities. Rebecca Evans answered in the affirmative.

- 2018 WDB Awards
Talia Barrera informed the attendees that there will be WDB Awards presented at the upcoming WDB Board Meeting.

8.0 Committee Member Comments

Patty Schulz informed the attendees that there is a new incoming WDB Board member: Rosa Serrato and informed them of possibly losing Board members: Greg Van Ness and Stephen Yeoh. One of the committee members suggested to recruit members from the energy sector. He said that he will refer them to Patrick Newburn. Patrick Newburn informed the attendees that the current WDB Board membership is compliant after Rosa Serrato's appointment, but if we will lose the two above-mentioned members, then the Board will not be compliant with regard to number of members.

Talia Barrera informed the attendees that the outgoing WDB members: Byron Lindros, Jim Faul, and Roger Rice will be recognized in the upcoming WDB Board Meeting.

9.0 Adjournment

Motion to adjourn at 9:15 a.m.: Vic Anselmo

Second: Alex Rivera

Motion carried

Next Meeting

March 14, 2019 (8:00 a.m.-9:30 a.m.)

United Food and Commercial Workers, Local 770

816 Camarillo Springs Road (Meeting Room), Camarillo



**WORKFORCE DEVELOPMENT BOARD OF VENTURA COUNTY
EXECUTIVE COMMITTEE**

MARCH 14, 2019

WDB COMMITTEES' REPORTS AND UPDATES

<u>Committee</u>	<u>Next Meeting Date</u>	<u>Committee Report Update</u>
• Business Services Committee	April 9, 2019	Committee report from the <u>February 12</u> meeting is attached.
• Clean/Green Committee	March 15, 2019	Committee reports from the <u>November 16</u> and <u>January 18</u> meetings are attached.
• Healthcare Committee	May 3, 2019	Committee report from the <u>November 2</u> meeting is attached. Committee report from the <u>March 1</u> will be provided at the next Executive Committee meeting.
• Manufacturing Committee	April 18, 2019	Committee report from the <u>February 21</u> meeting is attached.
• Membership Committee	April 2, 2019	Committee report from the <u>February 5</u> meeting is attached.
• Outreach Committee	March 20, 2019	Committee report from the <u>March 20</u> meeting will be provided at the next Executive Committee meeting.
• Programs Committee	April 3, 2019	Committee reports from the <u>December 5</u> and <u>February 6</u> meetings are attached.



WORKFORCE DEVELOPMENT BOARD

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TO: EXECUTIVE COMMITTEE

**FROM: JESUS TORRES, CHAIR
BUSINESS SERVICES COMMITTEE**

DATE: MARCH 14, 2019

SUBJECT: BUSINESS SERVICES COMMITTEE

The Business Services Committee met on Tuesday February 12, 2019. In attendance were Committee members Jesus Torres (Chair), Stephen Yeoh, Heidi Hayes, Marybeth Jacobsen, WDB staff Talia Barrera; and guests Yvonne Jonason (Employment Training Panel), Christy Norton (America's Job Center of California/WIOA), and Jaimé Duncan (Adult and Family Services-WIOA).

Jesus Torres shared with the committee new initiative and focus for the committee, which will include strategies to support business and identify areas of opportunity for business support.

Heidi Hayes presented to the committee the results of the Business Services Survey. The online survey was conducted with 125 Ventura County businesses and the sample was a representative mix of the Ventura County Region by location, industry, and number of employees. The intent of the survey was to learn what services and resources to businesses are perceived to be of value, and what programs and services might be worth further discussion. The survey is in alignment with the CWDB Regional Plan Implementation workplan, which will help identify the programs that the WDB is promoting to address the skilled workforce deficits we face as a region. Copies of the study are available on the Workforce Development Board website at: www.workforceventuracounty.org. As a result of this survey, the committee will be working to identify the areas of need, including regional economic indicators related to business services.

Jaimé Duncan and Christy Norton provided an update on the activities and events at the America's Job Center of California. The AJCC team is currently working on providing support to approximately 15 WARN notices received from October 2018 resulting in support to over 300 employees. The use of OJT's has increased within the past few months, with a more noticeable focus on Insurance Services. The AJCC continues to focus on supporting and align staffing on the sectors identified by the WDB.

The next Business Services Committee meeting is scheduled for Tuesday, April 9, 2019, from 10:00 a.m. to 11:30 a.m.

If you have questions or need more information, please call me at (805) 910-7028, or contact Talia Barrera at 805-477-5341, email: talia.barrera@ventura.org.



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TO: EXECUTIVE COMMITTEE

**FROM: ANTHONY MIRELES, CHAIR
CLEAN/GREEN COMMITTEE**

DATE: MARCH 14, 2019

SUBJECT: CLEAN/GREEN COMMITTEE REPORT

The Clean/Green Committee met on November 16, 2018. In attendance were Committee members Anthony Mireles (Chair), John Brooks, Victor Dollar, Dave Fleisch, Grant Leichtfuss and WDB staff Patricia Duffy.

Ventura County Regional Strategic Workforce Development Plan

- Clean Power Alliance and EV Infrastructure and EV Mechanics

John Brooks informed the Committee about the Clean Power Alliance. This is a new locally operated electricity provider for communities in Ventura and Los Angeles Counties. The Clean Power Alliance will purchase clean power and Southern California Edison will still provide transmittal lines. Cities and individuals can opt out and cities can choose the percentage of clean energy they want. Ventura chose 100%. Currently 1/3 of the energy in California is green. Clean energy will be purchased from other states to meet the demand. The Alliance offers several options and reinvests funds in projects in the community.

John Brooks also informed committee members about an EV group that will be meeting to address electric vehicle infrastructure. With the increase of electric vehicles, 440,000 have been sold in California, there is a need for more public charging stations to support these vehicles. The prediction is one out of every eight vehicles will be electric by 2030. New construction is required to be solar ready and EV plug ready. Apps are also becoming available to tell you where charging stations are located. There is also a need for EV mechanics, the committee members discussed finding out from the colleges if enough training is being provided to support the need for the expanding demand.

- Deputy Sector Navigator – AWET Update

Patricia Duffy gave the report for Holly Chavez who sent a written report for the meeting. Patricia read the report to the Committee. Holly Chavez reported that she will continue in her position and the contracts had been renewed. Holly will be performing an in-depth agriculture industry employer gap analysis survey and data collection, funding has already been secured for the project. The results will be used to deploy strategies which will better serve the needs of the agriculture industry. Holly will report progress at our next meeting. They are still deciding if they will be reporting the data by separate counties in the region. Holly is hoping to hold a mini grant competition within the next few months. The Chancellors office will be dispersing \$10,900,000 regionally for K-12 CTE programs through the Regional Consortium.

- Review and Follow up: Previous Meeting's Planning Discussion

Patricia Duffy distributed the Dun & Bradstreet data indicating the businesses in Ventura County, that have been identified as green businesses. The green list includes businesses in Ventura County certified as Green by prominent industry standards using national, state and local certification and industry standards.

At the previous meeting the Committee discussed what the committee would like to focus on going forward. The Committee members prioritized some of the recommendations discussed previously. The previous Dean at Oxnard College and committee member, had suggested exploring a way to require a short course that addresses sustainability across all the CTE programs at the college. The committee members suggested this should be one of our high priorities. Working with the new Dean is a committee priority as well as working with other colleges to see if there would be a way to work sustainability into all the CTE programs.

Other priorities were to focus on industry using sustainability to attract talent and encourage businesses to use sustainability as a recruiting tool, use sector committees to engage businesses, bring more businesses to the committee, create value, promote green components in every job and identify new training that is needed to keep up with emerging markets such as EV mechanics.

- Workgroup Report: Employer Awareness, Video Review

Patricia Duffy shared the two completed videos with the committee for comments. The committee members were informed that the two remaining videos should be completed shortly after the New Year.

The next meeting of the Clean/Green Committee will be on January 18, 2019 at UFCW, 816 Camarillo Springs Road, Camarillo.

If you have questions or need more information, please call Patricia Duffy at (805) 477-5350, email Patricia.Duffy@ventura.org.



TO: EXECUTIVE COMMITTEE

**FROM: ANTHONY MIRELES, CHAIR
CLEAN/GREEN COMMITTEE**

DATE: MARCH 14, 2019

SUBJECT: CLEAN/GREEN COMMITTEE REPORT

The Clean/Green Committee met on January 18, 2019. In attendance were Committee members Anthony Mireles (Chair), John Brooks, Holly Chavez, Victor Dollar, Darrell Gooden and Mary Anne Rooney; WDB staff Patricia Duffy and Guests, David Goldstein (RMDZ Ventura County Recycling and Market Development Zone, Celine Park (Moorpark College), Yvonne Jonason (ETP), Julie Kalbacher (Metropolitan Water District Southern CA.), and Leigh Walker (County of Ventura Regional Energy Alliance). Topics of discussion included:

Ventura County Regional Strategic Workforce Development Plan

- Guest Speaker :Administrator of the Ventura County Recycling Market Development Zone (RMDZ)

David Goldstein informed the Committee members on the RMDZ and the benefits available to industry. The RMDZ uses recycling as an incentive to drive economic development by supporting new businesses and business expansion which will divert waste from landfills. The RMDZ can help employers with low interest loans and assistance with other financing for projects that will increase the market demand for recyclables. Up to 75% can be financed for project and loans can be up to 2 million per loan for 15 years. The RMDZ also provides support and assistance for manufacturers and new businesses making products from recyclable materials and assistance through the permitting process.

There is a need to have control of our own recycling efforts rather than shipping our recyclables to other countries. Some companies are adding the cost of recycling into the cost of the products, an example given was mattresses. Providing incentives for business and entrepreneurs to utilize recyclable products will create more green jobs.

- Deputy Sector Navigator – AWET Update

Holly Chavez, DSN for Agriculture Water and Environmental Technologies, gave an update to the Committee members. Her position has been funded in the South Central Coast Region for another five years. There is 150 million dollars coming to the Chancellor's Office to enhance K-12 CTE programs statewide. Ms. Chavez reported that Perkins was reauthorized on the Federal level. She will be hosting the third annual Ag conference at Cal Poly this month, which is a two-day event held on Saturday and Sunday. Ms. Chavez has allocated money from her budget for a gap analysis for the Ag industry and will be including the Ventura region. She noted that Ventura is number 8 in the State for agriculture production and is unique since the Ventura climate allows for 4 crops a year. Ms. Chavez reported that with the signing of the farm bill industrial hemp is

now legal nationwide. She informed the committee that mini grant applications will be coming out soon.

- Career Pathways Update:

Darrell Gooden reported that he will be hosting another event similar to the event held at the Water Treatment Plant called "Sustainable VC" That event had a large turnout which included 45 professionals participating and 120 students. This event will be held on February 6th at the Ventura College Wright Center from 11:30-1:30 and will include an Entrée to Employment luncheon with students and industry professions.

Mary Anne Rooney gave an update on the Civic Alliance and the Career Pathways Program. The Civic Alliance grant for Career Pathways expires at the end of the academic year. Mary Anne reported the Green Technologies program is looking for summer internships in green industries.

Ms. Rooney announced that the Civic Alliance won the WDB Youth Opportunity Award.

Ms. Rooney also reported on the Port of Hueneme zero admissions project. The Port received a three million dollar grant. An example is using an electric crane to reduce emissions. The Port has hired an environmental specialist and has collaborated with the Port in LA. There are internship opportunities at the Port, for high school students, in global logistics and international trade. These are paid internships.

- EV Infrastructure and EV Mechanics

John Brooks gave an update on the electric vehicle meeting that was held in Ventura. This is a collaborative effort between Santa Barbara and Ventura. He reported that public utilities are putting 20 million dollars into increasing EV charging stations. Incentives used for EV have been raised. The \$450 credit has been raised to \$1,000. There are added incentives for lower income individuals.

- Occupational Employment and Data Growth Projections

Patricia Duffy handed out the updated Occupational Employment and Data Growth Projections for green industry jobs.

The next meeting of the Clean/Green Committee will be on March 15, 2019 at the United Food and Commercial Workers (UFCW), Local 770, 816 Camarillo Springs Road, Camarillo.

If you have questions or need more information, please call Patricia Duffy at (805) 477-5350, email Patricia.Duffy@ventura.org.



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TO: EXECUTIVE COMMITTEE

**FROM: GREG BARNES, CHAIR
HEALTHCARE COMMITTEE**

DATE: MARCH 14, 2019

SUBJECT: HEALTHCARE COMMITTEE REPORT

The WDB Healthcare Committee met on November 2, 2018. Attending the meeting were Committee members; Greg Barnes (Chair), John Cordova, Adam Hunt, Marilyn Jansen, Sandy Melton, Lisa Safaeinili, Carolina Ugarte, Bill Werner, WDB staff Patricia Duffy; and guests, Michelle Culpepper (Vista Del Mar) and Teri Hollingsworth (Hospital Association of Southern, CA). The following is a summary of topics discussed:

Ventura County Regional Strategic Workforce Development Plan

- Healthcare Deputy Sector Navigator Update:

John Cordova updated the committee on the search for his replacement as the Deputy Sector Navigator for Healthcare for the South Central Coast Region. The interviews have been completed and a candidate selected. A public announcement of the new Deputy Sector Navigator will be soon. John has a new position as Statewide Navigator for Healthcare and will remain at the College of the Canyons and will keep our region informed of Statewide initiatives.

John announced that the DSNs have submitted their projects to the College Consortium Chairs for funding.

John also announced that the Patient Navigator course, being run through the VCCCD, start time was delayed.

- Specialty Nursing Planning Discussion

Committee members discussed specialty nursing needs in the region. Teri Hollingsworth, Vice President of HR and Education Services, Hospital Association of Southern California joined the Committee for the discussion on the shortage of specialty nurses. Christina Lee sent a report on information she gathered. Christina asked the clinical partners for the top 3 specialty nursing training courses that are needed or projected to be needed. Their response was 1) Critical care, 2) OR and number three had a tie 3) Peds. or wound, ostomy, continence nursing. In addition, committee members from hospitals added a need for surgical nurses, case managers, ER and a critical need for a pipeline of workers for behavioral health positions.

There was a discussion regarding the need for clinical spaces for specialty nursing. Running the courses in the summer was suggested. It was stated that a shortage of clinical training spaces is a statewide problem. There was a mention of using the prison healthcare system as

clinical sites. There was also a discussion of developing more apprenticeship models in healthcare and being able to tap into additional funding sources.

Having the right people at the table was discussed. The decision makers at the hospitals involved with clinical site rotations need to be included as well as the HR directors and CNOs. Hospitals need to look ahead to project needs.

Next steps: Patricia Duffy and John Cordova will coordinate with the Hospital Association of Southern CA., to bring together key people in the region to address the specialty nursing shortage.

- Regional Healthcare Care Coordinator Pathway Project

Patricia Duffy gave an update on the Care Coordinator courses offered in the Ventura region. Patricia reported that level II online training is available and distributed information on how to access these training courses.

- CLS Field Placement Update:

Patricia Duffy presented, for Dawn Neuman, an update on the CLS Field Placement Program. The first Cohort of eight finished last year and all eight passed the exam and are licensed with jobs. The second cohort of eight students is just finishing and the new cohort is just beginning with ten students. Dignity Health was added as a participant, so we now have five hospitals participating.

The next meeting of the Healthcare Committee will be on January 4, 2019 at the United Food and Commercial Workers (UFCW), Local 770, 816 Camarillo Springs Road, Camarillo.

If you have questions or need more information contact Patricia Duffy at (805) 477-5306, e-mail Patricia.Duffy@ventura.org.



TO: EXECUTIVE COMMITTEE

**FROM: ALEX RIVERA, CHAIR
MANUFACTURING COMMITTEE**

DATE: MARCH 14, 2019

SUBJECT: MANUFACTURING COMMITTEE REPORT

The Manufacturing Committee met on February 21, 2019. In attendance were Committee members: Alex Rivera (Committee Chair), Greg Gillespie*, Cindy Guenette*, Marilyn Jansen*, Bill Pratt *, Peter Zierhut*, Michael Bastine, Rebecca Hunt, and Marybeth Jacobsen and (* indicates WDB Board members). WDB Staff present were Rebecca Evans and Patrick Newburn. The following is a summary of topics discussed at the meeting:

Committee Discussion:

Committee members engaged in robust discussion on issues identified in their year-end review as being important insights. Chair Alex Rivera led discussion on the following questions:

- How do we value and support the Manufacturing Roundtable of Ventura County?
 - **Findings:**
 - Keep the meetings relevant to manufacturing
 - Invite Guest Speaker to attend that are relevant to manufacturing concerns
 - Consider host meeting at new start-up business
 - Consider inviting city economic development directors to take lead in organizing
- How do we identify new business members to join the Manufacturing Committee?
 - **Findings:**
 - Keep the meetings relevant to manufacturing and define purpose of meetings and consolidate related topics
 - Invite Guest Speaker to attend that are relevant to manufacturing concerns
 - Invite new start-up business owners to join committee
 - Establish goals for committee that have likelihood of accomplishment within program year
 - Remain dedicated to discussing workforce development issues
 - Agenda to have standing reports from Ventura County Community College District and Workforce Education Coalition

- How do we identify Work Based Learning opportunities (apprenticeships, guild, and related On-the-job training) for AJCC and WIOA individuals?
 - **Findings:**
 - Inform and educate employers about OFTs and apprenticeships and disseminate information to wide audience
 - Work closely with Ventura County Community College District to develop apprenticeship and pre-apprenticeships
 - Explore fast track program at College of the Canyons
- How do we identify “First Opportunity” manufacturing jobs and willing employers for justice involved/reentry individuals?
 - **Findings:**
 - Collaborate with Ventura County Probation Agency to discover existing business friendly to hiring formerly incarcerated
 - Explore increased training opportunities in construction occupations
 - Inform and educate employers regarding human resource related laws as well as federal bonding programs and work opportunity tax credit
 - Identify cadre of human resource directors that have success stories in hiring former felons
 - Convene a regional meeting for business owners to learn about hiring justice involved individuals
 - Emphasize hiring the “individual” based upon their circumstance versus general blanket policy
 - Promote 40-hour pre employment manufacturing skills readiness training offered at Ventura Community College
 - Emphasize apprenticeships in the trades

Workforce Development Reports

Patrick Newburn provided committee with updates on recent grants such as Prison to Employment Initiative and the National Dislocated Worker Grant (Woolsey Fire). Additionally he explained the current update to the WDB Strategic Plan with a Two-Year Regional & Local Plan Modification.

The next meeting of the Manufacturing Committee meeting will be on April 18, 2019, at the United Food and Commercial Workers (UFCW), Local 770, 816 Camarillo Springs Road, Camarillo.

If you have questions or need more information, please call me at (805) 579-5188, or contact Patrick Newburn at (805) 477-5470, email patrick.newburn@ventura.org.



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TO: EXECUTIVE COMMITTEE

**FROM: PATTY SCHULZ, CHAIR
MEMBERSHIP COMMITTEE**

DATE: MARCH 14, 2019

SUBJECT: MEMBERSHIP COMMITTEE REPORT

The Membership Committee met on February 5, 2019. In attendance were Committee members: Patty Schulz (Committee Chair), and Captain Douglas King. (All are Board members). WDB Staff present were Rebecca Evans and Patrick Newburn. The following is a summary of topics discussed at the meeting:

Membership Status

- **Reappointments:** Jeremy Goldberg, Richard Trogman, Greg Van Ness, and Stephen Yeoh have terms expiring March 8, 2019. Committee members reviewed membership terms and discussed each member and agreed to invite all four for reappointment to new three-year terms. Committee members divided assignments to conduct personal contact with each member listed. Additionally, Charles Harrington, Tracy Perez, and Peter Zierhut have terms expiring May 17, 2019. Committee members reviewed membership terms and discussed each member and agreed to invite all three for reappointment to new three-year terms. Committee members accepted assignments to conduct personal contact with each member listed.
- **Appointments:** Committee members discussed board composition, WIOA categories of representation, required business member and workforce member ratios, and the engagement/recruitment process. The committee agreed that the WDB will require one Education category representing Adult Education, following the WDB retirement of Roger Rice in January. The WDB is required to fill the Adult Education vacancy as soon as possible according to by laws. Additionally members noted the board is not in compliance in the business category, however the appointment scheduled on February 19, 2019 by the Board of Supervisors to consider recommendation for appointment Rosa Serrato in the business category will bring WDB into compliance.
- **Recruitments:** One new candidate from the education/ Adult Education category has been engaged and has attended committee meetings and WDB meetings. The committee directed staff to provide an application and request resume and reference.

WIOA Workforce Development Planning

Committee Members discussed and agreed that continued focus and education on roles and responsibilities is needed with the WDB membership. Members requested staff to prepare a schedule for ongoing refresher-orientations to be conducted with WDB members.

Members discussed WDB member attendance at WDB meetings and agreed to review records at next committee meeting in April. Members agreed in the importance of WDB membership regularly attending the bi-monthly meetings is important to provide consistent and informed oversight of WIOA funds and programs.

Committee Member Comments

Rebecca Evans discussed the importance of transparent membership outreach and engagement as well as announcing vacancies at public meetings. Ms. Evans suggested that the WDB executive and WDB meetings will offer opportunity to announce and enlist support from current membership to provide names of interested individuals in serving on sector committees and the WDB.

The next meeting of the Membership Committee will be on April 2, 2019, at the United Food and Commercial Workers (UFCW), Local 770, 816 Camarillo Springs Road, Camarillo.

If you have questions or need more information, please call me at (805) 650-8611, or contact Patrick Newburn at (805) 477-5470, email patrick.newburn@ventura.org.



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TO: EXECUTIVE COMMITTEE

**FROM: TONY SKINNER, CHAIR
PROGRAMS COMMITTEE**

DATE: MARCH 14, 2019

SUBJECT: PROGRAMS COMMITTEE REPORT

Two Programs Committee Reports listed herein: 1) December 5, 2018 and 2) February 6, 2019.

I. December 05, 2018 REPORT

The Programs Committee met on December 5, 2018. In attendance were Committee members: Tony Skinner (Chair), Kathy Harner, Roger Rice, Linda Fisher-Helton, Leslie Webster, and Many Navarro-Aldana. WDB Staff present was Patrick Newburn. Guests in attendance were: Pierrette Authier (PathPoint), Mariana Cazares (Boys & Girls Clubs Greater Oxnard and Port Hueneme (BGCOP), Jessica Gallardo (PathPoint), Marixza Juarez (PathPoint), and Kim Whittaker (PathPoint) The following is a summary of topics discussed at the meeting:

WIOA Workforce Development Planning:

Patrick Newburn provided several updates and reports on the following topics:

- WDB Grants Update: Prison to Employment Initiative (P2E) \$37 Mil State General Funds approved for "*Prison to Employment Initiative*" to help Justice Involved Individuals gain meaningful employment upon release from prison, Ventura County award amount to be determined in Spring to provide earn and learn opportunities with supportive services; National Dislocated Worker Grant (NDWG) \$2.4 Million to provide 50 Ventura county Dislocated Workers temporary employment in clean-up of public property damaged by the fires, as well a career services and supportive services to gain sustained employment following the temporary jobs; Veterans Employment Assistance Program (VEAP). Requested \$500,000 Grant funding for employment services for 55 veterans.
- HSA/WIOA Monitoring: Committee reviewed the county HSA/WIOA Monitoring of Youth Contract Providers conducted in November 2018. Committee members discussed the county observations and findings. Providers are working with county to provide corrective action. Boys and Girls Clubs of Greater Oxnard and Port Hueneme requested continued and regular technical assistance and policy updates. Both providers requested additional technical assistance on Credential Attainment and training on generating reports within CalJOBS. Committee Members requested a written summary of both EDD and County monitoring in the future to aide with tracking

and follow-up, which would include dates, findings, action plans, and related details that will aid the committee in providing oversight.

WIOA Performance Indicator Reports: Committee reviewed annual (PY1817-18) and quarterly (Q1 PY18-19) WIOA performance indicator reports. The annual reports provided have partial data reported in CalJOBS, and the resulting outcomes are not a complete representation of performance. This limitation is due to the exit cohort periods reporting back in 2016-17 not being captured by CalJOBS system programming. The most reliable reports and reporting will be captured in the PY 2018-19 reports. Committee members focused discussion on the youth outcomes. Both providers expressed concern about their performance and pointed out past performance success even though current reports show some measure with less than 100% of goal. Newburn pointed out that the current predictive reports available in CalJOBS will make it easier for both providers and committee to gain a snapshot of performance.

II. February 06, 2019 REPORT

The Programs Committee met on February 6, 2018. In attendance were Committee members: Tony Skinner (Chair), Kathy Harner, Linda Fisher-Helton, and Leslie Webster. WDB Staff present was Patrick Newburn and Dez Robite. Guests in attendance were: Pierrette Authier (PathPoint), Mariana Cazares (Boys & Girls Clubs Greater Oxnard and Port Hueneme (BGCOP), Jessica Gallardo (PathPoint), Kim Whittaker (PathPoint), Omar Zapata (BGCOP) Ken Barrow (Human Services Agency), and Vivian Pettit (Human Services Agency). The following is a summary of topics discussed at the meeting:

WIOA Youth Service Providers Presentations:

Boys and Girls Clubs of Greater Oxnard and Port Hueneme (BGCOP):

Mariana Cazares, Youth Empowerment Programs Manager presented a PowerPoint presentation to committee members. Mariana introduced Omar Zapata, Director of Program Services. Mariana explained an overview of their WIOA out of school youth services. To-date, BGCOP has enrolled 76 youth this program year within Oxnard and Port Hueneme. She provided success stories from recent individuals where the WIOA services provided through BGCOP had dramatic impact in their lives, and resulted in life changing outcomes. Members asked follow-up questions about EDD and HSA monitoring in 2018. Marianna responded with a few lessons learned and improvements implemented in service delivery. Committee members thanked her and BGCOP for their successful track record in delivering WIOA services to this population facing multiple barriers to employment.

PathPoint

Kim Whitaker, Vice President of PathPoint for Ventura County and Youth Network Services presented a PowerPoint presentation to committee members. Ms. Whitaker explained an overview of their WDB contract providing WIOA out of school youth services. Kim introduced the youth specialists attending the committee meeting, Pierrette Authier and Jessica Gallardo. Additionally, she gave a brief overview of PathPoint's breadth of other youth programs and reach serving communities from Bakersfield, San Luis Obispo down to Long Beach since 1986. PathPoint's WIOA services have enrolled 79 youth this program year. Their array of WIOA services, focused on serving all other cities in Ventura County not serviced by BGCOP. Ms.

Whittaker invited Pierrette and Jessica to present a few success stories of PathPoint's accomplishments in helping hard-pressed youth find meaningful employment and training. Kim answered committee member questions about the EDD and HSA quality assurance monitoring's in 2018. Some of the issues discussed by committee members included performance reports, case notes, and supportive services. Whittaker said their team has met and begun implementing lessons learned from both monitoring's, including improving procedures for case notes, exit dates, and supportive services. Kim expressed appreciation for past technical assistance training received following the monitoring and asked that additional CalJOBS training be provided. Kim expressed improved understanding of self-monitoring as they implement WIOA programs to be a prudent steward of WIOA program funds. Committee members expressed thanks for her presentation and the work on PathPoint YNS.

Member Comments

Linda Fisher Helton reinforced the standing HSA practice that youth providers should be provided CalJOBS and other technical assistance as requested. Guest Ken Barrow, from HSA Contracts and Monitoring Department explained to committee members that both youth providers have individually complied with all requests from his department. Ken also commented that HSA has provided several technical assistance meetings as well as formal classroom training throughout 2018. Tony Skinner and Kathy Harner individually thanked the providers for their beneficial presentations.

The next meeting of the Programs Committee will be on March 5, 2019 at the America's Job Center of California, 2900 N. Madera Road, Simi Valley, CA.

If you have questions or need more information, please call me at (805) 642-2149, or contact Patrick Newburn at (805) 477-5470, email patrick.newburn@ventura.org.

WDB Executive Committee
Finance Report Summary Highlights
March 14, 2019

1. FY 2018-19 Financial Status Report – 7/1/18-1/31/19
 - a. Report Period 7/1/18-1/31/19
 - b. 58% through the fiscal year
 - c. Summary Chart – provides a visual view of magnitude of grants and expenditures to date
 - d. Actual to Plan
 - i. Core Grants
 1. Total expenditures are in line in most Core Grants.
 2. Rapid Response Other Operating costs are at 76% of Plan amounts.
 - a. Smaller proportional size of this grant compared to the other core grants can result in significant % swings.
 - ii. Other Grants
 1. Smaller size of the grants can result in significant % swings overall.
 2. Grants have varying contract ending dates.
 - a. Special attention needs to be paid to these ending dates when evaluating grant to date spend percentages.
 3. High Performing Boards (WDB-1080)
 - a. Grant performance period ended 12/31/18. 100% of available funds were spent during contract period.
 4. Regional Capacity Building (AFS-1087; 1090)
 - a. Overall spending has been increased 8 percentage points since last report.
 - b. Salaries and Benefits are now at 91%. This amount contains adjustments from prior fiscal year.
 - c. Direct Program costs remain at 27%.
 - i. Current YTD amount includes \$3.5K of expenditures on VOS Greeter Project.
 - ii. Training totaling approximately \$21K that commenced January 2019 will increase these costs.
 5. Regional Organizer (WDB-1089)
 - a. Continuing to work with Program to monitor spend, especially with Salaries and Benefits.
 - i. Program prepared a budget modification to move funds from Contractual Services to Salaries to fully utilize grant funds.
 6. Workforce Accelerator 6.0 (AFS-1117)
 - a. Overall actual to plan total amounts is at 32%.
 - b. Salaries and Benefits currently at 43%.
 - i. Working with Programs to monitor spend rate to ensure maximum grant funds utilized.
 - c. Direct Program/WIOA amounts currently is at 9%.
 - i. Contract of approximately \$65K for consultant to provide tools, resources, and facilitation of stakeholder meetings signed and implemented.
 1. First task (to develop workplan) invoiced by CWA January 2019.

WDB Executive Committee
Finance Report Summary Highlights
March 14, 2019

7. Regional Plan Implementation (WDB-1122)
 - a. Overall spend to Plan percentage is 41%
 - b. Direct Program costs are at 45%.
 - i. Program staff will continue to work with EDC-VC and The Agency to monitor spend to agreement amounts.
- e. Paid & Accrued – provides the breakout of actual paid and accrued expenditures
- f. Training Report
 - i. 17-19 Grants (Due 10/1/19)
 1. 100% of training requirement met as of 12/31/18.
 2. Have until 6/30/19 to meet this requirement.
 - ii. 18-20 Grants (Due 10/1/20)
 1. 48% of training requirement met as of 12/31/18.
 2. Have until 6/30/20 to meet this requirement.
2. FY 2018-19 WIOA Budget Plan (Presented at 2/14/19 WDB Executive Meeting: Updated with NDWG 2018 Information) – Year to Date Expenditures
 - a. Updates to Plan consist of:
 - i. Column for 2018 Mega Wildfires NDWG grant totaling \$810K awarded 12/26/18 with a contract period of 12/6/18-12/31/20 has been added.
 1. \$668,191 budgeted for 7/1/19-12/31/20
 2. \$142,213 budgeted for 1/1/19-6/1/19
 - b. Prison to Employment – Contract effective 10/1/18-3/31/20. \$19K in costs were paid as of 1/31/19. An additional \$11K in consultant services will be processed in February.
 - c. Row 26 Boys and Girls Club: Core Program – Historically, costs have been low at the beginning of the fiscal year and increased as the year progresses. Current fiscal year is following this pattern.
 - d. Row 31 ITA/OJT – This fiscal year, low training expenditures will be addressed in part with a shift of \$100,000 from Dislocated Worker to Adult where there is higher demand. Current FY 18/19 training expenditures first applied to line 32, “FY 17/18 ITA/OJT Committed 17/18 Spent in 18-19”, with the balance applied to Line 31, “ITA/OJT (30% required-10% leverage)”.
 - e. Rows 49-69 – Variances among these various expenditure categories is common, especially in categories with relatively small expenditure levels.
 - i. Row 51 Books and Publications – Underbudgeted. Budget reduction at beginning of the year should have been increased as grant funding increased. Will be adjusted for FY 2019-20 Budget.
 - ii. Row 62 Conferences and Seminars WDB Staff – Underbudgeted. Budget reduction at beginning of the year should have been increased as grant funding increased. Will be adjusted for FY 2019-20 Budget. Does not include “grant specific” travel that has been moved to row 40.
 - iii. Current year spend levels will be considered during development of FY 2019-20 Budget Plan.



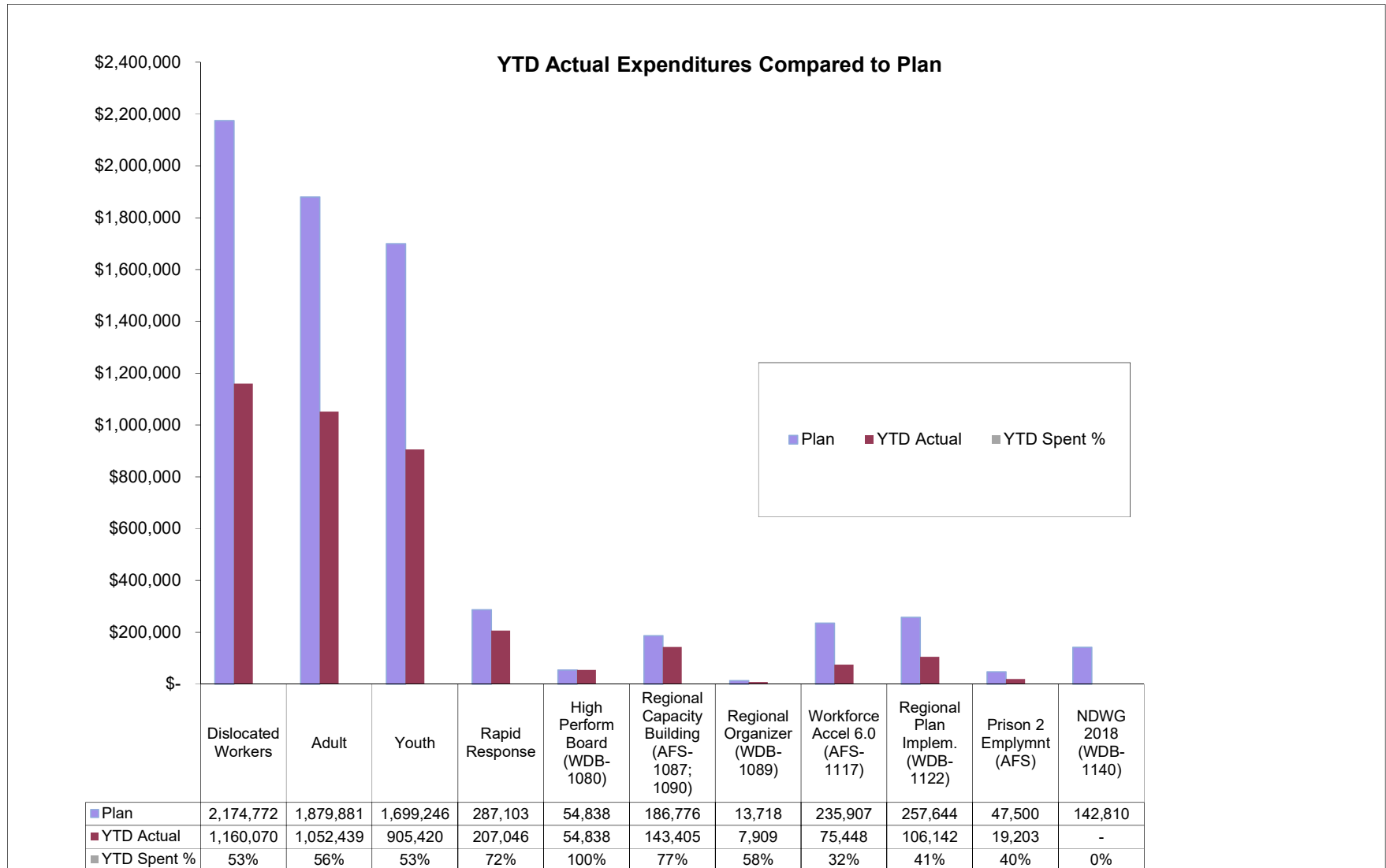
FINANCIAL STATUS REPORT for FISCAL YEAR 2018-2019

Year to Date Expenditures from 07/01/18 to 1/31/19 (58% into the Fiscal Year)

Submitted on: March 14, 2019

FINANCIAL STATUS REPORT for FISCAL YEAR 2018-2019

Year to Date Expenditures from 07/01/18 to 1/31/19 (58% into the Fiscal Year)



FINANCIAL STATUS REPORT for FISCAL YEAR 2018-2019

Year to Date Expenditures from 07/01/18 to 1/31/19 (58% into the Fiscal Year)

Name of Grants	Salaries and Benefits			Direct Program/WIOA Special Projects			Other Operating Expenses			Total			
	Plan	YTD Actual	%	Plan	YTD Actual	%	Plan	YTD Actual	%	Plan	YTD Actual	%	Plan Balance
Core Grants:													
Dislocated Worker	1,416,993	736,857	52%	503,168	259,131	51%	254,610	164,082	64%	2,174,772	1,160,070	53%	1,014,702
Adult	1,141,987	641,012	56%	495,428	267,376	54%	242,466	144,051	59%	1,879,881	1,052,439	56%	827,442
Youth	216,956	139,490	64%	1,262,000	663,313	53%	220,289	102,617	47%	1,699,246	905,420	53%	793,826
Rapid Response	126,181	109,213	87%	114,000	61,984	54%	46,922	35,850	76%	287,103	207,046	72%	80,057
Other Grants:													
High Perform Board (WDB-1080) (12/1/16-12/31/18)	47,985	53,777	112%	-	-	0%	6,852	1,062	15%	54,838	54,838	100%	(0)
Regional Capacity Building (AFS-1087; 1090) (3/1/17-3/31/19)	136,645	124,067	91%	27,200	7,359	27%	22,930	11,980	52%	186,776	143,405	77%	43,370
Regional Organizer (WDB-1089) (3/1/17-3/31/19)	9,034	6,815	75%	3,000	-	0%	1,684	1,095	65%	13,718	7,909	58%	5,808
Workforce Accel 6.0 (AFS-1117) (2/1/18-7/31/19)	136,645	58,743	43%	70,300	6,489	9%	28,962	10,215	35%	235,907	75,448	32%	160,459
Regional Plan Implem. (WDB- 1122) (1/1/18-6/30/19)	54,514	22,706	42%	171,500	76,536	45%	31,631	6,900	22%	257,644	106,142	41%	151,502
Prison 2 Employment (AFS) (10/1/18-3/31/20)	-	-	0%	47,500	19,203	40%	-	-	0%	47,500	19,203	40%	28,298
NDWG 2018 (WDB-1140) (4/1/18- 12/31/20)	15,767	-	0%	126,446	-	0%	597	-	0%	142,810	-	0%	142,810
Total WIOA Grants	\$ 3,302,708	\$ 1,892,680	57%	\$ 2,820,542	\$ 1,361,390	48%	\$ 856,944	\$ 477,852	56%	\$ 6,980,194	\$ 3,731,920	53%	\$ 3,248,273

FINANCIAL STATUS REPORT for FISCAL YEAR 2018-2019												
Year to Date Expenditures from 07/01/18 to 1/31/19 (58% into the Fiscal Year)												
	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
CORE GRANTS:												
Dislocated Worker	718,889	17,968	736,857	223,518	35,612	259,131	101,258	62,824	164,082	1,043,665	116,405	1,160,070
Adult	625,299	15,713	641,012	215,965	51,411	267,376	89,251	54,801	144,051	930,514	121,925	1,052,439
Youth	135,881	3,609	139,490	472,403	190,910	663,313	63,580	39,038	102,617	671,864	233,556	905,420
Rapid Response	106,193	3,020	109,213	47,443	14,540	61,984	22,212	13,638	35,850	175,848	31,198	207,046
OTHERS:												
High Perform Board (WDB-1080)	53,616	161	53,777	-	-	-	1,061	-	1,061	54,677	161	54,838
Regional Capacity Building (AFS-1087; 1090)	122,485	1,582	124,067	7,359	-	7,359	7,422	4,557	11,980	137,266	6,140	143,405
Regional Organizer (WDB-1089)	6,656	158	6,815	-	-	-	678	416	1,095	7,335	575	7,909
Workforce Accel 6.0 (AFS-1117)	57,433	1,311	58,743	6,489	-	6,489	6,365	3,850	10,215	70,288	5,161	75,448
Regional Plan Implem. (WDB-1122)	22,178	528	22,706	65,717	10,820	76,536	4,155	2,745	6,900	92,049	14,093	106,142
Prison 2 Employment (AFS)	-	-	-	19,203	-	19,203	-	-	-	19,203	-	19,203
NDWG 2018 (WDB-1140)	-	-	-	-	-	-	-	-	-	-	-	-
Total WIOA Grants	\$ 1,848,628	\$ 44,052	\$ 1,892,680	\$ 1,058,098	\$ 303,292	\$ 1,361,390	\$ 295,982	\$ 181,869	\$ 477,851	\$ 3,202,707	\$ 529,213	\$ 3,731,920

WIOA 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 07/01/18 to 1/31/19 (58% into the Fiscal Year)

Rpt Line #	Program Year Funding and Traing Expenditures	14-16 Grants (Due 10/1/16)	15-17 Grants K698402 (Due 10/1/17)	16-18 Grants K7102079 (Due 10/1/18)	17-19 Grants K8106696 (Due 10/1/19)	18-20 Grants K8106696 (Due 10/1/20)
4)	Adult and Dislocated Worker Formula Fund Allocations	4,092,349	4,133,724	4,014,468	3,728,337	3,654,508
5)	Training Expenditures Required	1,023,087	1,240,117	1,204,340	1,118,501	1,096,352
	<i>Training Expenditures % Required</i>	25%	30%	30%	30%	30%
6)	Formula Fund Training Expenditures	1,128,877	941,344	810,112	701,097	437,517
7)	Leveraged Resources					
	- Total Leveraged Resources	425,933	348,361	460,403	380,348	197,897
	- Maximum Allowed Leveraged Resources (10%)	409,235	413,372	401,447	372,834	365,451
	- Total Leveraged Resources Used Towards Training Expenditures	409,235	348,361	401,447	372,834	197,897
8)	Total Amount Spent On Training (should equal/exceed Line 5)	1,538,112	1,289,705	1,211,559	1,118,501	590,843
	% of Training Requirement Met (final goal is 100%)	150%	104%	101%	100%	54%

9)	Leveraged Resources Detail (notes)					
	(a) Pell Grant	135,654	150,761	46,245	124,433	10,315
	(b) Programs Authorized by the Workforce Innovation and Opportunity Act	-				
	(c) Trade Adjustment Assistance (EDD)	-				
	(e) Match Fund from Employers, and Industry Associations (OJT 50%)	290,279	197,600	355,201	255,915	187,582
	Total	425,933	348,361	401,447	380,348	197,897
	Legends/Coding for Source/Type of Leveraged Resources: 9a) = Pell Grant 9b) = Programs Authorized by the Workforce Innovation and Opportunity 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 2018-19 WIOA BUDGET PLAN (Presented at 2/14/19 WDB Executive Meeting: Updated with NDWG 2018 Information)																
		Dislocated Worker	Adult	Youth	Rapid Response	High Perform Board (WDB-1080)	Regional Capacity Building (AFS-1087; 1090)	Regional Organizer (WDB-1089)	Workforce Accel 6.0 (AFS-1117)	Regional Plan Implem. (WDB-1122)	Prison 2 Employment (AFS)	NDWG 2018 (WDB-1140)	FY 18-19 Plan	Year to Date Expenditures from 7/1/18 to 1/31/19 (58% into the Fiscal Year)		
						12/1/16-12/31/18	3/1/17-3/31/19	3/1/17-3/31/19	2/1/18-7/31/19	1/1/18-6/30/19	10/1/18-3/31/20	4/1/18-12/31/20				
Revenue Projection:																
FY18-19 Grants	-2.5%	2,051,956	1,502,552	1,630,835	297,362	54,838	205,000	85,714	250,000	350,000	47,500	810,404	7,286,161			
FY17-18 Mgmt. Reserve:(3% DW, Adult, Youth)		(51,299)	(37,564)	(40,771)	-	-	-	-	-	-	-	-	(129,634)			
Transfer DW to Adult		(100,000)	100,000	-	-	-	-	-	-	-	-	-	-			
Grant balance rollover		-	-	-	-	-	-	-	-	-	-	(668,191)	(668,191)			
Spent in prior years		-	-	-	-	-	(14,943)	(70,377)	(7,136)	(86,246)	-	-	(178,702)			
Balance rolled over from prior year grants:																
FY17-18 Mgt Reserve		64,278	49,059	55,075	-	-	-	-	-	-	-	-	168,412			
Additional rollover - Salaries Savings/Overhead Saving/(Overage)		2,603	122,116	5,881	-	-	-	-	-	-	-	-	130,600			
FY 17-18 Unspent Direct expense		188,904	117,598	56,044	-	-	-	-	-	-	-	-	362,546			
ITA/OJT Committed FY17-18 Spent in FY18-19		19,668	42,428	-	-	-	-	-	-	-	-	-	62,097			
Total Available Grants to be Spent		2,176,110	1,896,189	1,707,064	297,362	54,838	190,057	15,337	242,864	263,754	47,500	142,213	7,033,289			
Grants %		30.9%	27.0%	24.3%	4.2%	0.8%	2.7%	0.2%	3.5%	3.8%	0.7%	2.0%	100.0%			
AFS FTEs Assigned to the programs		11.27	8.79	0.36	0.83	-	1.30		1.30	-	-	0.15	24.00			
% Direct FTES Allocated to Grants		47.0%	36.6%	1.5%	3.5%	0.0%	5.4%	0.0%	5.4%	0.0%	0.0%	0.6%	100.0%			
% Admin Staff Allocated to Grants		29.8%	28.0%	23.00%	5.00%	6.0%	0.0%	1.2%	0.0%	7.0%	0.0%	0.0%	100.0%			
Expenditure Projection:																
Salaries and Benefits:																
AFSWIOA (24 regular filled + 0.7 fixed term + 2 vacancies)		2,522,683	1,184,610	923,933	37,840	87,243	-	136,645	-	136,645	-	15,767	2,522,683	1,422,580	56%	
WDB Admin (6 filled +.75 be filled+buydown)		778,765	232,383	218,054	179,116	38,938	47,985	-	9,034	-	54,514	-	780,025	470,099	60%	
Salaries Reduction		-											-			
Subtotal Salaries and Benefits			1,416,993	1,141,987	216,956	126,181	47,985	136,645	9,034	136,645	54,514	-	15,767	3,302,708	1,892,680	57%
Direct Expenses:																
Grant Specific Contracts																
EDC-VC Business Services			-	-	-	95,000	-	-	-	100,000	-	-	195,000	106,173	54%	
Boys and Girls Club: Core Program			-	-	604,000	-	-	-	-	-	-	-	604,000	292,429	48%	
PathPoint: Core Program			-	-	604,000	-	-	-	-	-	-	-	604,000	332,283	55%	
AFS-CalWORKs Activities			-	-	-	-	-	-	-	-	-	-	-	-	0%	
Subtotal - Contracted Program Expense			-	-	1,208,000	95,000	-	-	-	100,000	-	-	1,403,000	730,884	52%	
Client Expenses:																
ITA / OJT (30% required - 10% leverage)			390,000	375,000	-	-	-	-	-	-	-	-	765,000	375,946	49%	
ITA / OJT Committed 17-18 Spent in 18-19			19,668	42,428	-	-	-	-	-	-	-	-	62,096	62,096	100%	
Others/Childcare/Trans - JTA			20,000	20,000	-	-	-	-	-	-	-	-	40,000	8,250	21%	
Subtotal - Client Expense			429,668	437,428	-	-	-	-	-	-	-	-	867,096	446,291	51%	
Other Allocated/Contracted Expenses																
Contractual Services		166,500	-	-	-	-	-	24,000	-	65,000	24,500	47,500	126,446	287,446	31,394	11%
Outreach - theAgency		185,000	52,500	40,500	45,000	12,000	-	-	-	35,000	-	-	185,000	136,500	74%	
Outreach/Conference -WDB (\$12K RPI Conf.)		47,000	12,000	12,000	7,000	4,000	-	-	-	12,000	-	-	47,000	6,641	14%	
WDB Expense - Non Staff		8,000	4,000	2,000	2,000	-	-	-	-	-	-	-	8,000	8,022	100%	
Outreach/Meeting/Conf-AFS		20,000	5,000	3,500	-	3,000	-	3,000	5,300	-	-	-	23,000	1,657	7%	
Subtotal - other allocated expense		426,500	73,500	58,000	54,000	19,000	-	27,200	3,000	70,300	71,500	126,446	550,446	184,214	33%	
Subtotal- Program/Clients Expenses			503,168	495,428	1,262,000	114,000	-	27,200	3,000	70,300	171,500	126,446	2,820,542	1,361,390	48%	
Total Direct Program Expense			1,920,161	1,637,415	1,478,956	240,181	47,985	163,845	12,034	206,945	226,014	47,500	142,213	6,123,250	3,254,069	53%
Overhead/Administration:																
Communication/Voice/data		75,000	22,283	21,220	19,280	4,107	600	2,007	147	2,535	2,768	-	52	75,000	41,462	55%
Insurance		14,043	4,172	3,973	3,610	769	112	376	28	475	518	-	10	14,043	10,375	74%
Facilities Maint.		95,090	28,252	26,905	24,444	5,207	761	2,544	187	3,214	3,510	-	66	95,089	49,020	52%
Membership and dues		12,350	3,669	3,494	3,175	676	99	330	24	417	456	-	9	12,350	11,282	91%
Education allowance (consolidated with line 64+65)		0	-	-	-	-	-	-	-	-	-	-	-	-	-	
Indirect cost recovery(County A87)		98,670	29,315	27,918	25,364	5,403	789	2,640	194	3,335	3,642	-	69	98,668	57,585	58%
Books and Publication		2,000	594	566	514	110	16	54	4	68	74	-	1	2,000	14,160	708%
Office Equip./Supp. & Furniture/Fixtures<5000		20,000	5,942	5,659	5,141	1,095	160	535	39	676	738	-	14	20,000	10,869	54%
Mail Center - ISF		6,000	1,783	1,698	1,542	329	48	161	12	203	221	-	4	6,000	4,635	77%
Purchase Charges - ISF		3,800	1,129	1,075	977	208	30	102	7	128	140	-	3	3,800	2,443	64%
Copy Machine - ISF		9,000	2,674	2,546	2,314	493	72	241	18	304	332	-	6	9,000	2,600	29%
Information Tech - ISF		10,000	2,971	2,829	2,571	548	80	268	20	338	369	-	7	10,000	4,963	50%
Computer Services Non ISF		2,000	594	566	514	110	16	54	4	68	74	-	1	2,000	1,167	58%
Building Lease/Rental		95,000	28,225	26,879	24,421	5,202	760	2,542	187	3,211	3,507	-	66	94,999	58,929	62%
Storage Charges - ISF		5,000	1,486	1,415	1,285	274	40	134	10	169	185	-	3	5,000	4,375	87%
Mileage Reimb. - Staffs only		26,000	7,725	7,356	6,684	1,424	208	696	51	879	960	-	18	26,000	14,138	54%
Conference/Seminars - AFS Staffs		8,000	2,377	2,264	2,056	438	64	214	16	270	295	-	6	8,000	1,823	23%
Conference and Seminars - WDB Staffs		10,000	2,971	2,829	2,571	548	80	268	20	338	369	-	7	10,000	17,636	176%
Fiscal/HR/BTD/ET (HSA)		350,000	103,991	99,029	89,971	19,164	2,796	9,365	688	11,829	12,919	-	244	349,996	164,404	47%
Attorney Fees		10,000	2,971	2,829	2,571	548	80	268	20	338	369	-	7	10,000	3,987	40%
Other misc. Admin Services		5,000	1,485	1,415	1,285	274	40	134	10	169	185	-	3	5,000	1,997	40%
Subtotal Overhead		856,953	254,610	242,466	220,289	46,922	6,852	22,930	1,684	28,962	31,631	-	597	856,944	477,851	56%
Planned Total Grant Expenses			2,174,772	1,879,881	1,699,246	287,103	54,838	186,776	13,718	235,907	257,644	47,500	142,810	6,980,194	3,731,920	53%
Admin Rate for State Reporting			7%	7%	7%	9%	7%	7%	7%	7%	0%	0%	7%			
Admin Rate (State Reported + Other)			12%	13%	13%	16%	12%	12%	11%	12%	0%	0%	12%			
Work in Progress: Grant Balances			1,339	16,309	7,818	10,259	-	3,281	1,619	6,957	6,110	-	(597)	53,100		



ECONOMIC
DEVELOPMENT
COLLABORATIVE



Economic Development Collaborative ADVISOR ROSTER

The Economic Development Collaborative's Small Business Development Center serves Ventura and Santa Barbara counties in partnership with the Los Angeles Regional Small Business Development Center Network and is funded in part through a cooperative agreement with the U.S. Small Business Administration.



Bruce Stenslie

Bruce Stenslie has 30 years of experience in workforce and economic development and has served since 2007 as president and CEO of the Economic Development Collaborative. Prior to the EDC, he served as deputy director for the California Workforce Association,

workforce policy director for the City of Los Angeles, assistant director of the Ventura County Human Services Agency and executive director of the Workforce Investment Board. Stenslie is a Governor's appointee to the California Workforce Development Board and currently serves in leadership positions for several state and local organizations including the California Stewardship Network, California Statewide Certified Development Corporation, California Small Manufacturers Health and Welfare Trust, First 5 Ventura County, Ventura County P-20 Council and the Workforce Development Board of Ventura County.

Specialties: Government Relations, Capital Access, Civic Engagement, Leadership

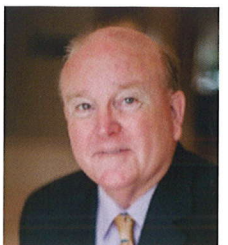


Ray Bowman

Ray Bowman, M.S., CGBP, is the director of the Small Business Development Center of Ventura and Santa Barbara counties. He is a business veteran with more than 30 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. Ray is a specialized consultant in international trade logistics, trade finance, vendor compliance, import and export compliance management, and overseas vendor and buyer issues. He has been an international and national keynote speaker and presenter in logistics infrastructure, international marketing, import and export, non-tariff trade barriers and international export economy. Ray serves as an executive education adjunct faculty member at Babson College in Massachusetts. He has a Green Belt in Lean Six Sigma and is the program chair for the District Export Council of Southern California.

Specialties: Entrepreneurship, Finance, International Business, Management & Operations



Bill Bartels

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.

Specialties: Entrepreneurship, Legal Compliance, Management & Operations, Strategic Planning



Marvin Boateng

Marvin Boateng, MPPA, has more than ten years' experience in the banking and finance industry. His areas of expertise include small business and SBA lending, financial analysis, valuation and business development.

In 2013, Marvin was recognized by the Pacific Coast Business Times "40 under 40" for his passion for public service. Before working for the EDC, Marvin was a branch manager at U.S. Bank.

Specialties: Finance & Loan Packaging, Venture Matchmaking



Clare Briglio

Clare Briglio, B.A., is a design and brand consultant. As a natural coach and advisor with a corporate background in talent acquisition, human resources and brand development, Clare brings a unique perspective that supports the growth of entrepreneurs and business

startups. Clare's breadth of experience and exposure to every facet of corporate structure gives her insight into developing key strategies that enable micro businesses to reach their full potential. With over 10 years of experience in the maker and art arena as a designer and as a business owner, her skill set includes identifying markets for the maker community and creating branding strategies to increase exposure and product strength.

Specialties: Entrepreneurship, Strategic Planning, Human Resources, Marketing & Sales, Branding & Social Media, E-Commerce, Disaster Response & Business Resiliency



Erica Bristol

Erica Bristol is an attorney and commercial mediator, specializing in intellectual property and business contracts and transactions. A graduate of UCLA School of Law, Erica served as corporate in-house counsel for over 11 years. A commercial mediator for

over seven years, Erica is the owner and principal mediator of EB Mediate, a commercial mediation service provider. She currently serves as a panel mediator for the United States District Court, Central District of California, the Santa Barbara Superior Court and the California Association of REALTORS® Buyer/Seller Mediation Program.

Specialties: Legal Compliance, Intellectual Property Protection

*Providing a pathway
to business growth,
community leadership
and economic prosperity*



Juan Cervantes

With an endless passion for creative design, Juan Cervantes is dedicated to helping brands revive their voice, realign their vision and expand their brand reach. With experience and passion in multiple industries such as beauty/cosmetics, skin care, medical, fashion, footwear and

apparel as well as the restaurant industry, fast food franchise, major food distributors, wine, sports and performance brands, Juan is a well-rounded talent with experience on high-profile projects for major brands. Juan is also an accomplished ink illustration artist, experienced event photographer and social media animator.

Specialties: Graphic Design, Branding & Social Media, Art Direction



Carlos Conejo

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.

Specialties: Management & Operations, Strategic Planning, Six Sigma Lean Manufacturing



Megan Cullen

Megan Cullen, B.A., has nearly 40 years of experience in international trade. In 2010, she was appointed to the District Export Council of Southern California and re-appointed in 2013. She learned about processing letters of credit while working at a lumber-exporting, woman-owned

business in Portland, Ore., and was the manager and sales supervisor for CMC Rescue in Goleta, managing company sales and distribution to 80 distributors worldwide. Currently she is the international sales and marketing manager at Soilmoisture Equipment Corp. in Goleta, handling a large international dealer network selling to universities, research institutions and governmental agencies.

Specialties: International Business, Marketing & Sales, Bilingual Spanish, German, French



Dean Dela Cruz

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.

Specialties: Six Sigma Lean Manufacturing, Management & Operations, Strategic Planning



Anthony Curtis Elliott

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.

Specialties: Finance & Loan Packaging, Venture Matchmaking



Gonzalo Fernandez

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.

Specialties: Finance & Loan Packaging, Venture Matchmaking, Strategic Planning, Bilingual Spanish



Virginia Fuentes

Virginia Fuentes is an attorney and human resources professional specializing in business and employment law. With her blended experience and academic achievements in law and human resources she brings a balanced and knowledgeable approach to

helping businesses with their employment management, policies and procedures. She currently serves as the Title IX coordinator and academic advisor for the Colleges of Law and as professor at the University of California Santa Barbara.

Specialties: Legal Compliance, Human Resources



Alondra Gaytan

Alondra Gaytan serves as the client services manager for the Small Business Development Center hosted by the Economic Development Collaborative. She is responsible for assessing small business owners and innovators seeking professional and technical assistance.

In addition, Alondra assigns small businesses to the SBDC's business advisers who provide free one-on-one consulting to businesses in Santa Barbara and Ventura counties. She coordinates with EDC's key programs providing resources to international trade businesses and manufacturing programs, as well as coordinating with the EDC Loan and EDC Invest programs.

Specialty: Entrepreneurship, Bilingual Spanish



John Haughey

John Haughey, B.S., is the CEO and 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.

Specialties: Entrepreneurship, International Business Management & Operations, Marketing & Sales

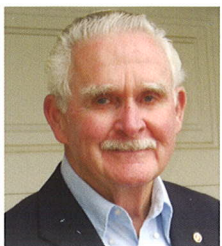


Shalene Hayman

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 in managerial finance/accounting functions. She is the CFO and/or controller

for many nonprofit organizations and small businesses in Ventura and Santa Barbara counties.

Specialty: Finance



Michael Kauffman

Based in Santa Barbara, Michael Kauffman, M.B.A., 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 has written on a range of business topics. Michael advises business owners and managers on a range of topics related to successful management and marketing strategies.

Specialties: Entrepreneurship, Finance, International Business, Management & Operations, Strategic Planning, Marketing & Sales



Doug Korte

Doug Korte is an internationally recognized, award-winning global technology business executive, guest speaker, investor and transformational leader, experienced in turning-around and growing high-tech companies sized from start-up to Fortune 50. In addition

to serving as an executive for IBM, Hewlett-Packard and Harris Corporation, responsible for multi-million-dollar business operations, he has helped over a thousand C-level and other top executives at companies of all sizes around the world break through to new levels of success. Today, Doug serves as an executive partner, leadership advisor and interim executive, providing actionable, outcome-based advice and execution across a full gamut of business issues to accelerate the achievement of client goals.

Specialties: Strategic Planning, Management & Operations



Sean L. Leonard

Sean L. Leonard, M.B.A., is the president and founder of S.L. Leonard & Associates, Inc., which oversees multimillion-dollar real estate projects primarily for nonprofits, developers and public entities. He has more than 30 years' experience in the Southern California real estate develop-

ment 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, that were awarded the prestigious AIA Presidential Award for Project Team of the Year.

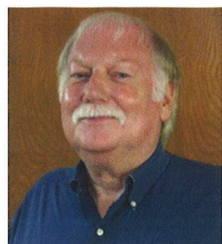
Specialties: Management & Operations



Sylvia Martini

Sylvia Martini, B.A., CGBP, supports clients with international trade, marketing and sales, public relations and web communications. Bilingual in German and English, she has over 30 years experience in international marketing and sales in several diverse industries, where she conducted competitive analysis, identified markets for start-ups, developed marketing strategies, provided sales training, organized events and trade shows. Sylvia has an international business certificate and is a certified global business professional through NASBITE International.

Specialties: International Business, Marketing & Sales, Bilingual German

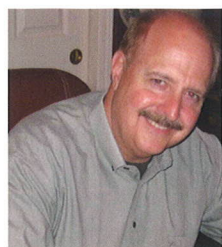


Matt McConville

Matt McConville, PMP, M.B.A., 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 contract functions and provides proposal strategy, leadership and process guidance.

Specialties: International Business, Management & Operations, Strategic Planning



Ron Meritt

Ron Meritt, B.A., is the president of Meritt International and Ölens 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.

Specialties: International Business, Manufacturing Assistance, Management & Operations, Marketing & Sales



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.

Specialties: Entrepreneurship, Management & Operations



Kelly Noble

Kelly Noble has been the office manager for EDC since 2003, giving her extensive experience managing workflow and office systems. She has expert organizational skills, honed through catering and party-planning. She is an entrepreneur and former owner of an appliance repair shop, where she handled all aspects of the business.

Specialties: Entrepreneurship, Management & Operations, Finance



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.

Specialties: Marketing & Sales



Manal Richa

Manal Richa, B.A., is the founder of The MarCom Network where she implements creative marketing plans for small- to medium-sized businesses, either by helping them grow their business from the beginning, increasing their exposure or positioning them as an established brand in the mind of their consumers. Her experience includes branding, planning and executing marketing campaigns utilizing deep situational analysis, efficient market research, effective client communications and successful collateral and web designs in addition to social media marketing strategies.

Specialties: Entrepreneurship, Marketing & Sales, Branding & Social Media, E-Commerce



Regina Ruiz

Regina Ruiz is a seasoned broadcast journalist who has anchored and reported at top-market television stations across the country for more than a decade including: upstate New York, New Mexico, Las Vegas, our home-town station KEYT and most recently she was a reporter for NBC in San Diego. She earned her master's degree in broadcast journalism from the highly acclaimed S.I. Newhouse School of Public Communications at Syracuse University. Regina is a journalism instructor at Santa Barbara City College, the founder and president of her own media company and uses her communications expertise to raise awareness in the local non-profit community. Regina is the director of communications at Women's Economic Ventures, where she is the chief organizer for the "I Love Local Business" marketing and PR campaign. She is an active member of the Carpinteria community serving as the Secretary of Aliso Elementary Parents organization (PFA).

Specialty: Marketing



Julie Samson

Julie Samson, M.A., is the director of Santa Barbara County's Small Business Development Center and Scheinfeld Center for Entrepreneurship and Innovation at Santa Barbara City College, and the deputy sector navigator for global trade and logistics in our region. 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.

Specialties: Entrepreneurship, International Business, Management & Operations, Strategic Planning



Lonnie Schnell

Lonnie Schnell has over 30 years' experience in the operational and financial management of high technology businesses in numerous industries, including electronics, aerospace, commercial and industrial equipment and consumer products manufacturing and distribution. A proven strategic leader focused on bottom-line improvements through revenue growth, operational efficiencies, and cost control, Lonnie is an effective problem solver, strategic thinker and team builder. Lonnie completed an executive MBA program with Stanford University Executive Institute and the American Electronics Association, and earned his BSBA in accounting (Cum Laude) at Christian Brothers University. He holds a CPA and CGMA designation and served more than five years with the international accounting firm of Ernst and Young.

Specialties: Strategic Planning, Management & Operations, Finance, Venture Capital



Karen Scuncio

Karen Scuncio, B.A., has over 25 years of experience in international business. Scuncio's expertise touches on all areas of exporting from export pricing, screening potential customers, distributor agreements, product labeling requirements, international shipping and payment terms as well as sales and marketing. Since 1997, she has been a principal in a business consulting and sales representative services company she helped start up to help small businesses increase their U.S. and international sales.

Specialties: Entrepreneurship, International Business, Strategic Planning, Marketing & Sales



Jay Tsao

Jay Tsao, M.B.A., is the founder and CEO of Globesmart Technologies, a global B2E e-commerce market place start-up utilizing innovative media and SaaS technology to facilitate commerce transactions and make trade between SME's easier around the world. Tsao was a partner and board member of Scepture Corporation and BridgeArc Trading, leading international trading and distribution conglomerates. He built several of the companies' e-commerce platforms and managed supply chain partners from raw material sourcing, OEM/private label development, pre/post production oversight, logistic strategies and customer clearance.

Specialties: Entrepreneurship, Finance, International Business, E-Commerce, Strategic Planning, Manufacturing Assistance, Marketing & Sales



Bryan Went

At the age of 16 he started his first company, Eccentric Motors, one of the first alternative fuel companies to generate power from hydrogen, and developed the first flexible fuel vehicle that could run on four different fuels. Born and raised in Silicon Valley, he cofounded Higher Standard Solutions with his brother Erick. Higher Standard Solutions provides strategic technologies for companies like SAP, Microsoft, Honda and FOX Studios. Bryan has studied, traveled and lived all over world. Currently he is the founder of Matter Labs, a start-up studio and corporate innovation lab.

Specialties: Entrepreneurship, Strategic Planning, Venture Matchmaking



Erick Went

Erick Went is the CEO and co-founder of Matter Labs. Described as a "big thinker" and a "foresight machine," Erick is focused on implementing practical applications of emerging technologies to help create competitive advantages for future industry leaders. Erick is passionate about distilling complex business problems down to their practical essence, helping organizations look beyond their own boundaries to discover new ideas, knowledge and ways of working. He has managed large-scale innovations engagements for companies ranging from Fortune 100 companies to early stage start-ups. Partnering with universities and venture-backed start-ups, Erick has developed forward-thinking scenarios and roadmaps that communicate the innovation potential of a core technology/process at the earliest possible stages, helping to protect, project and expand the scope of their intellectual property claims and long-term competitiveness. He has experience working with global leaders on corporate strategies and transformation, often acting as interim chief technology officer and chief innovations officer at multi-million dollar enterprises.

Specialties: Entrepreneurship, Strategic Planning, Venture Matchmaking



Eric Zackrison

Eric Zackrison, M.B.A., M.A., Ph.D., has been teaching, training, and consulting in Santa Barbara and Ventura for the last five years, with a focus on team building, leadership and strategy. His published research indicates that workplace relationships are at the core of coordinated teams and organizations. His work embraces the understanding that individuals have diverse ways of interacting and empowers people to manage those differences to be more successful.

Specialties: Entrepreneurship, Management & Operations, Marketing & Sales, Strategic Planning

To learn more about our advisors and accessing services call: 805.309.5874 or visit www.edcollaborative.com



**ECONOMIC
DEVELOPMENT
COLLABORATIVE**

Economic Development Collaborative
4001 Mission Oaks Blvd, Suite A-1
Camarillo, CA 93012

The Economic Development Collaborative hosts the Small Business Development Center and is funded in part through a cooperative agreement with the U.S. Small Business Administration.



EDC Partnership Project

Regional Alignment of Employer Engagement Resources, Advancing an Industry Demand Driven Model

Phase 1: Setting Overall Purpose & Goal, Defining the Problem to Be Solved, Imagining Success

Purpose: Striving for and Establishing Alignment with WDB Local & Regional Plans and CA State Plan for Sustainable Delivery of Industry Demand Driven Resources & Services.

Objectives:

- Reducing duplication of business outreach efforts,
- Optimizing value from all business engagements,
- Improving efficiency in referrals between and among business service partner organizations,
- Sharpening and expanding targeted outreach to high demand priority sectors.

Outcomes:

- Improving alignment of the several partner organizations involved in business engagement,
- economizing limited resources to achieve scale and impact,
- *resulting in improved employment and training outcomes for workers and jobs seekers.*

The Setting: The project builds on existing capacities, partnerships and investments:

- Core Resource Partners: WDB Network, EDC/SBDC, SBA, GOBiz, WEV, SCORE, VCCCD, VCOE
- EDC Partnership with VCCCD, Resource Guide (CA Stewardship Network funds).

Phase 2: Implementation, Alignment of Business Engagement Services & Providers

- Partner Engagement/Buy-In
 - ✓ Secure SBA and Governor's Office Support (funding for fire recovery, service expansion)
 - ✓ Secure WDB/RPU Support for Resource Linkage (RPI funds, see separate project summary)
 - ✓ Continued EDC CA Stewardship Network Funding to VCCCD for Career Education Alignment
- Initiate Activities:
 - ✓ Resource Mapping, Referral Coordination
 - Women's Economic Ventures
 - SCORE
 - Governor's Office of Business & Economic Development
 - ✓ Restructure EDC Website and Communication Capacity
 - Revise, Streamline Resources
 - Business Incentives
 - Permit Information
 - Start-up Guide
 - Revise Consultant Roster, Service Capacity Resources
 - Update Partner Resources
 - ✓ Kaizen/Lean Project with EDC Small Business Development Center/AJCC/WDB Business Facing Staff
 - Develop As-Is Understanding/Awareness of Partner Resources, Services, Outcomes
 - Align Outreach Processes, Priorities, Capacities
 - **Establish Communication and Information Sharing System (tools & protocols) for Outreach, Services, Shared Outcomes**

BUSINESS ENGAGEMENT ECOSYSTEM: IDEAL STATE





WORKFORCE DEVELOPMENT BOARD

855 Partridge Drive, Ventura, CA 93003

(805) 477-5306

workforceventuracounty.org

TO: EXECUTIVE COMMITTEE

FROM: REBECCA EVANS, EXECUTIVE DIRECTOR

DATE: MARCH 14, 2019

SUBJECT: RECOMMENDATION THAT THE WORKFORCE DEVELOPMENT BOARD OF VENTURA COUNTY (WDB) APPROVE A RECOMMENDATION TO THE BOARD OF SUPERVISORS, APPROVAL OF A CONTRACT WITH ECONOMIC DEVELOPMENT COLLABORATIVE TO PROVIDE WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) BUSINESS RETENTION – LAYOFF AVERSION SERVICES FROM JULY 1, 2019 THROUGH JUNE 30, 2020, IN THE AMOUNT OF \$95,000 IN WIOA FUNDS, UNDER RFP# 1718.02, RELEASED ON AUGUST 28, 2017 AND CLOSED ON SEPTEMBER 25, 2017

RECOMMENDATION

Recommendation that the Workforce Development Board of Ventura County recommend to the Board of Supervisors approval of a contract with EDC to provide Workforce Innovation and Opportunity Act (WIOA) Business Retention– Layoff Aversion services from July 1, 2019, through June 30, 2020, in the amount of \$95,000 in WIOA funds, under RFP# 1718.02, released on August 28, 2017 and closed on September 25, 2017.

The initial base performance period of the contract was from July 1, 2018-June 30, 2019, and upon performance deliverables, mutual agreement, between WDB and EDC, and subject to the appropriation of funds, the option to extend the contract for two program years as follows:

- Base Term: July 1, 2018 – June 30, 2019
- Option Term 1: July 1, 2019 – June 30, 2020
- Option Term 2: July 1, 2020 – June 30, 2021

If approved by the Executive Committee today, a recommendation will be presented at the WDB meeting on April 25, 2019 to recommend a contract proposal Option Term 1: July 2019 – June 30, 2020, to be submitted for approval by the Board of Supervisors.

DISCUSSION

At the Executive Committee meeting on November 9, 2017, the Executive Committee discussed the results of the RFP process and agreed on the recommendation that the Workforce Development Board (WDB) approve a recommendation to the Board of Supervisors to award the Economic Development Collaborative of Ventura County (EDC-VC) a new contract from July 1, 2018 through June 30, 2019 in the amount of \$95,000.

On August 28, 2017 the Workforce Development Board of Ventura County (WDB), issued a publicly advertised competitive procurement process (Request for Proposals-RFP). The purpose of this RFP

was to find qualified experienced organizations to provide a regional business expansion-layoff aversion services to promote the WDB's role in the County's economic vitality and workforce development in Ventura County. Following the RFP bidders conference on September 8, 2017, one firm submitted proposal by the September 25, 2017 due date. The proposal passed the initial review conducted by the County of Ventura Human Services Agency and was referred to a selection panel for evaluation and scoring. Final score was based on the applicant compliance and response to RFP program and financial criteria.

Working in alignment with the WDB goals and program support services described in the WDB-approved plan, EDC-VC will provide assessment to businesses, identify firms at-risk for lay-offs and through WIOA funding, provide layoff aversion services. Will also focus on the identification of firms and workers whose at-risk condition may be mitigated by incumbent worker training (IWT).

If you have questions, please contact me at (805) 477-5306, or Talia Barrera at (805) 477-5341, email talía.barrera@ventura.org.



***COUNTY of VENTURA
HUMAN SERVICES AGENCY
&
WORKFORCE DEVELOPMENT BOARD***

Present a Request for Proposals For

**WORKFORCE INNOVATION AND OPPORTUNITY ACT- RAPID
RESPONSE**

**Business Retention –
Layoff Aversion Services
(Rapid Response)
(RFP #1718.02)**

RELEASE DATE:	August 28, 2017
DUE DATE:	5:00 P.M. – September 25, 2017
BIDDERS CONFERENCE:	9:00 – 10:00 A.M. – September 8, 2017 In the Pepper Tree Conference Room at: Human Services Agency 855 Partridge Drive Ventura, CA 93003

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COUNTY OF VENTURA - WORKFORCE DEVELOPMENT BOARD RAPID RESPONSE/BUSINESS RETENTION AND LAYOFF AVERSION SERVICES

SECTION I: PROGRAM INFORMATION

A. BACKGROUND/OVERVIEW

The Workforce Development Board of Ventura County (WDB) is seeking proposals from qualified, experienced organizations for a regional business expansion-layoff aversion project to promote the WDB's role in the County's overall economic vitality and workforce development. Proposals are being accepted from agencies that demonstrate a familiarity with the local economy and workforce issues. Interested bidders will demonstrate knowledge of local education and training programs available to job seekers and employers, exhibit strong linkages to local businesses and the public sector and demonstrate expertise in inter-agency collaboration.

In partnership with the Board of Supervisors, the Workforce Development Board implements the Workforce Innovation and Opportunity Act of 2014 (WIOA), oversees the America's Job Center of California in Ventura County and establishes programs in response to the needs of Ventura County employers. The WDB includes representatives from private businesses, education, labor, economic development and community-based organizations. The Board of Supervisors appoints WDB members who serve as volunteers for three-year terms.

The primary purpose of Rapid Response Services, as mandated by the EDD Directive WSD 16-04, and as stated in federal guidance, is to enable affected workers to return to work as quickly as possible following a layoff, or to prevent layoffs altogether.

To pursue these responsibilities, the WDB requires the following allowable types of Rapid Response and Layoff Aversion services:

1. Helping unemployed workers quickly return to productive positions in the labor force
2. Helping employers explore alternative to layoffs through human resource solutions
3. Reducing the economic and social burdens that unemployment adds to employers, workers and the community
4. Providing local communities, workforce investment partners, employers and workers with timely and pertinent information to anticipate and profit from economic development opportunities

The WDB actively works to carry out the following essential responsibilities:

- To articulate and express the workforce development needs of the community
- To promote collaboration among the several local stakeholders in workforce preparation and development
- To build consensus on workforce needs, issues and priorities
- To provide current and accurate information on which to base decisions
- To help define the important workforce issues in Ventura County
- To be an engaged advocate and decision-maker in the development of public policy decisions affecting the local workforce and business productivity

B. FUNDING SOURCE AND PERFORMANCE PERIOD

Funding for this project is available from the County's allocation of WIOA Title I-D resources for Rapid Response and the selected contractor will be considered a subawardee of prime federal

funds per 2 CFR 200 and subject to pass-through terms and conditions (CFDA #17.278).

The Workforce Development Board may enter into a contract with the successful bidder for a base term beginning July 1, 2018, through June 30, 2019, with two options years (extending through June 30, 2021) to be exercised at the discretion of the Workforce Development Board and the County Board of Supervisors. The initial base-year contract will not exceed \$95,000.

This will be a cost-reimbursable subaward contract. Payment will be made upon submission and approval of monthly invoices.

All activities must be allowable under the provisions of Code of Federal Regulations, part 682, Rapid Response Activities under the WIOA and in compliance with applicable WIOA regulations and any other requirements identified by the State, County or federal governments. See Employment Development Department (EDD) Directive WSD 16-04 for the Dislocated Worker 25 Percent Funding Policy and Allowable Rapid Response Activities.

C. SCOPE OF WORK

The purpose of this proposed grant of WIOA funds is to develop and oversee the implementation of a regional strategic plan for rapid response and layoff aversion to benefit Ventura County employers and workers. This grant must minimize employee layoffs and increase job growth in the area. Provision of these services will entail the following:

- Use of current data relating to short-term and long-term economic dislocation/layoffs, business retention, labor market information and business expansion
- Ongoing engagement, partnership, and relationship-building activities with businesses, in order to create an environment for successful layoff aversion efforts
- Integration of workforce development and economic development needs in the region
- Close communication with businesses to regularly monitor early warning indicators of potential layoffs
- Provide assistance to employers in managing reductions in force, which may include early identification of firms at risk of layoffs, assessment of the needs of and options for at-risk firms
- Connect businesses to resources such as loans, business assistance programs, market analysis, and economic development activities to prevent layoffs
- Develop process for identifying early warning of potential layoffs or opportunities for layoff aversion
- Leverage accurate information about regional economic trends, labor markets, new business development, and education and training resources

Contractor will be expected to provide appropriate outreach as needed to deliver services. All such materials will require WDB approval and may include:

- A monthly newsletter, distributed electronically to businesses throughout the County
- A business retention/layoff aversion print ad campaign
- Printed flyers distributed via local chambers of commerce and their publications and through libraries, banks, *etc.*
- Press releases and feature story pitches to Ventura County media on services available and local business success stories
- A website, including a link to the WDB website
- Public service announcements on radio outlets
- Regular meetings with the business community through a variety of forums, including, but not limited to, focus groups, advisory committees, Rapid Response Services, community-based organizations and contractor's already established network of service organizations

- Report of program activities and outcomes as required to document achievement of program objectives identified by the WDB Executive Committee and/or the WDB Board
- Provide incumbent worker training services as defined in WIOA 134(d)(4) & CFR section 680.780, 680.790 and 680.800.

The contractor will be expected, as part of allowable WIOA Rapid Response activities, to undertake an incumbent worker training program, with the purpose of retaining workers in their current jobs or enabling them to earn an industry-recognized certificate. WIOA comprehensive incumbent worker services include, but are not limited to, recruitment and determination of WIOA eligibility, curriculum development, assessment, case management, delivery of skill attainment training, provision of support services and job retention services.

The contractor may establish cooperative financial or non-financial agreements with other qualified agencies to assist in the provision of incumbent worker training for employers at risk of having to lay off workers and their incumbent workers. Such services may include any of the allowable incumbent worker services as noted above, including collecting and maintaining required participant tracking data. Any such agreement(s) will require the approval of Workforce Administration.

The success of Rapid Response activities and incumbent worker training will be measured against the development, coordination and phased implementation of a plan consistent with WDB priorities, and aligned with the work of the WDB Outreach Committee and approved by the WDB (or the WDB Executive Committee).

D. PERFORMANCE OUTCOMES

Contractor performance will be evaluated against quantitative measures. Planned performance achievement levels will be established through the WDB Executive Committee evaluation process. Areas of WDB evaluation may include any or all of the following:

- Number of employers who indicate that at least five of their employees are at-risk of layoff, who are then provided layoff aversion services. (Employers will self-identify and certify jobs “at-risk” of elimination.)
- Number of at-risk jobs retained as a result of efforts of the Contractor’s services. (A “job retained” will be measured as a worker who is still employed six weeks after all services to the employer have been completed.)
- Number of workers provided incumbent worker training that results in skill attainment that improves worker’s qualifications or skill levels
- Satisfactory customer satisfaction survey results of employers served under this project

E. BIDDERS CONFERENCE/TECHNICAL ASSISTANCE

A Bidders’ Conference to answer questions about the RFP, the application process, program specifications and contract requirements will be held at **9:00 a.m. on September 8, 2017**, at HSA, in the Pepper Tree Room at 855 Partridge Drive, Ventura, CA 93003. If there are any significant interpretations, direction or revisions to the RFP such information will be posted on the HSA website. Attendance at the Bidders’ Conference is optional, but strongly recommended.

All inquiries regarding this RFP must be submitted in writing no later than September 12th, to allow sufficient time for preparing responses. Submit questions to Tina Knight, HSA Contracts & Grants Manager, at the address specified above or by e-mail at Tina.Knight@ventura.org or by fax at (805) 477-5490. Questions and answers regarding this RFP will be posted on the HSA website continually throughout the grant application process.

F. AWARD PROCESS TIMETABLE

Activity	Date
Bidders' Conference*	September 8, 2017, 9:00 – 10:00 a.m.
Last Date to Submit Questions	September 12, 2017, 4:00 p.m.
Proposal Submission Deadline*	September 25, 2017 5:00 p.m.
Notification to Selected Contractors	by March 1, 2018
Contract Approval by the Board of Supervisors (tentative)**	May- June 2018
Contract Start Date	July 1, 2018

* Human Services Agency, Administrative Offices, 855 Partridge Dr., Ventura, CA 93003

SECTION II – RFP GUIDELINES

A. RESPONSIVE PROPOSAL

A "responsive proposal" means one that substantially complies with all requirements of the RFP, including evidence that the bidder will adhere to all required State and County regulations, required insurance coverage limits, fiscal responsibilities, contract conditions and reporting requirements governing the proposed activity.

Any proposal may be declared non-responsive if it fails to conform to the essential requirements of the RFP and submission process and will not be considered or evaluated.

The bidder agrees to provide the County with any other information the County determines as necessary for an accurate determination of the prospective contractor's qualifications to perform services.

B. ACCEPTANCE OF PROPOSAL CONTENT

The contents of a successful proposal shall become contractual obligations if procurement action ensues. Failure of a successful bidder to accept these obligations in a contractual agreement may result in cancellation of the award. The County of Ventura reserves the right to negotiate additional provisions to those stipulated in the proposal; recommend and/or award in amount(s) less than stated in the RFP and negotiate a reduction or increase in service levels commensurate with funding availability.

The successful bidder must have the ability to negotiate the terms of the contract agreement with the County within thirty days following selection. The County of Ventura will make the final decision on contract award.

C. REJECTION OF PROPOSALS

Failure to furnish all information requested in this RFP or to follow the proposal format requested may disqualify the proposal. Any exceptions to the Scope of Services required by this RFP must be justified in the proposal.

The County reserves the sole and exclusive right to reject any or all proposals received in response to this RFP, or to cancel this RFP, in whole or in part, with or without cause, if it is in the best interest of the County to do so.

A bidder's submitted proposal may be withdrawn by written request prior to the proposal submission deadline.

D. EVALUATION AND SELECTION PROCESS

All proposals will be subject to a standard review process. An initial review of each proposal will be conducted by HSA staff to determine if it is complete, in the required format and in compliance with all requirements of this RFP. Failure to meet all of these requirements may result in a rejected proposal.

Each proposal that passes the initial review will be evaluated and scored by a review panel comprised of WDB members and/or County staff. The review panel may interview bidders as part of the review process. Panel members will review and score each proposal on the basis of the criteria stated in Section III below: Attachment 2 (Narrative).

Final scores will be reviewed by County staff and presented to the WDB Executive Director in developing a final recommendation to the WDB and Board of Supervisors for award of a contract.

It is County of Ventura policy that review panelists not solicit or receive any oral communication from any potential contractor regarding any proposal under consideration, with the exception of a formal panel interview, if requested.

Evaluation Criteria	Point Value
Project Design and Implementation	40
Knowledge Experience and Performance	45
Budget and Cost Effectiveness	15
Total	100 Points

Narrative responses to each section of the application, any attachments and the completed budget forms will be reviewed to determine compliance with the requested information and the feasibility and reasonableness of proposed program design, cost and expected outcomes.

E. PROTEST RIGHTS

Upon written request, any unsuccessful bidder is entitled to an explanation as to why its proposal may have been irregular and/or the basis for the award of the contract to the successful bidder. Protests shall be in writing and received within ten (10) calendar days following the announcement of intent to award contract.

It is the bidder's responsibility to ensure receipt by County to the designated address. A postmark will NOT be accepted as meeting the deadline requirements. No extensions may be provided to this protest provision. Protests shall be addressed to:

Tina Knight, Contracts & Grants Manager
County of Ventura
Human Services Agency
855 Partridge Drive
Ventura, CA 93003

The protest shall state the reason for the protest, citing the law, rule, regulation, or practice on which the protest is based. A written response will be sent to the protester within ten (10) working days after receipt of the written protest. Prior to the award of a contract, if any bidder files protest against the awarding of the contract, the contract may not be awarded until either the protest has been withdrawn or HSA has decided the matter.

F. AWARD AND COMMENCEMENT OF WORK

1. Recommendation for award is contingent upon successful negotiation of the contract and resolution of any protests. The successful bidder shall be required to sign the negotiated contract, which will be in the form and content as approved by County.
2. The final authority to award a contract rests solely with the County of Ventura. The successful bidder shall not be allowed to begin work under any negotiated contract until such time as the contract has been approved by the County of Ventura.
3. The successful bidder must agree to all terms, insurance coverage provisions and conditions of the contract with HSA.
4. If only one proposal is received and it is deemed that such proposal meets requirements for funding, County reserves the option to award such entity a contract on a sole-source basis. In the event no proposals are received, or proposals received do not meet requirements for funding under this RFP, County reserves the right to be the contractor of last resort, or to designate another qualified entity to operate the program on a sole-source basis.

G. LIMITATIONS

This RFP does not obligate the County of Ventura to award a contract, to pay for any costs incurred

in the preparation of a proposal, or to procure or contract for services or supplies.

The County reserves the sole and exclusive right to accept or reject any or all proposals received as a result of this RFP, to negotiate with all qualified sources, or to cancel in part or in its entirety this RFP, with or without cause, or to issue a new RFP, if it is in the interest of the County to do so. A bidder may be required to enter into negotiations and to submit any price, technical or other revisions of the proposal as may result from negotiations.

H. METHOD OF PAYMENT

A cost reimbursement contract will be developed. This contract is considered a subaward, pass-through from federal funds per 2 CFR 200. The contractor will be reimbursed monthly in arrears for approved and allowable contract costs in accordance with a detailed line item budget approved by the County. The County may choose to negotiate other contract payment methods. Applicants must have the ability to maintain sufficient cash flow (e.g., lines of credit, cash reserve on hand) to meet ongoing financial obligations of program operation, pending reimbursement monthly from the County, in arrears net 30 days of approved and allowable claims for services rendered. No cash advances are provided.

I. PROHIBITION OF COLLUSION

Respondents to this Request for Proposals shall not engage in any actions, conversations or agreements with other parties that would be considered in restraint of free and open competition. Such activities that are intended to limit open competition by deceiving, misleading, or attempting to otherwise divide the market for the services being requested through this RFP are prohibited. If collusion is determined, it may be grounds for disqualification from the competitive process.

J. PROPOSALS PROPERTY OF COUNTY

All proposals become the property of the County of Ventura upon opening and shall not be returned to the bidder. Proposals shall remain confidential until the evaluation process is completed and tentative award has been posted by HSA. All proposals will be considered public documents, subject to review and inspection by the public at the County's discretion, in accordance with the Public Records Act.

K. ADDENDA AND SUPPLEMENT TO RFP

If revisions or additional information to this RFP become necessary, HSA will post the addenda or supplements on the HSA website.

L. ADDITIONAL REQUIREMENTS

1. The selected contractor(s) shall operate the project continuously throughout the term of the contract with HSA. Personnel shall be qualified in accordance with the applicable requirements of the agreement and any future amendments thereto.
2. All bidders responding to this RFP are specifically prohibited from soliciting letters of support from HSA staff. Bidders are hereby notified that HSA maintains a policy that prohibits its employees from providing letters of support, recommendations or advocacy for an outside agency, firm, or individual engaged in a competitive procurement process managed by HSA.
3. The County shall have the right to review the work being performed by the Contractor(s) at any time during the Contractor's usual working hours.
4. If a bidder is recommended for contract award under this RFP, they shall be required to certify and provide certain documents as identified below *prior* to contract award.

Signed copies of each of the following forms:

- Drug Free Workplace certification pursuant to 20 CFR Section 667.200(d)
- Debarment and Suspension pursuant to regulations implementing Executive Order 12549
- Certification Regarding Prohibition on Lobbying using federal funds

5. The recommended bidder will need to submit evidence of the following insurance requirements effective on or before start of the contract:

- A. Commercial General Liability "occurrence" coverage, naming the County of Ventura as additionally insured, in the minimum amount of \$1,000,000 combined single limit (CSL) bodily injury & property damage each occurrence and \$2,000,000 aggregate, including personal injury, broad form property damage, products/completed operations, broad form blanket contractual and \$50,000 fire legal liability.
- B. Commercial Automobile Liability coverage in the minimum amount of \$1,000,000 CSL bodily injury & property damage, including owned, non-owned and hired automobiles. Also to include Uninsured/Underinsured Motorists coverage in the minimum amount of \$100,000 when there are owned vehicles. Contractor must have on file evidence of auto insurance in the minimum amount of \$100,000 CSL bodily injury & property damage for all employees and volunteers associated with the contract.
- C. Workers' Compensation coverage, including a Waiver of Subrogation in full compliance with California statutory requirements, for all employees of Contractor and Employer's Liability in the minimum amount of \$1,000,000.

Additional information regarding insurance requirements can be found in the Human Services Agency Contracts Manual. A copy of the Contracts Manual is available at www.vchsa.org on the Request for Proposals page. Click on the Partners & Providers link on the left navigation bar; then click on the Request for Proposals link for RFP-related items.

6. The recommended Contractor will be subject to the County of Ventura Living Wage Ordinance. The Ordinance requires the payment of a living wage and accompanying paid time off to all covered employees engaged in providing services pursuant to a service contract as defined in Sec. 4952(f) of the County's Living Wage Ordinance.

7. Misrepresentation during the procurement or contracting process in order to secure the contract will disqualify a bidder or contractor from further consideration in the procurement or contracting process. Failure to comply with contract requirements once a contract has been awarded will constitute a material breach of the contract and may result in the suspension or termination of the affected contract and debarment from future County contracting opportunities for a period not to exceed three years. Other penalties may also apply.

8. As applicable, the successful bidder shall also submit to the County prior to contract award the following documents:

- Most recent Audit
- Articles of Incorporation or business license
- Handicapped Access Survey

SECTION III – SUBMISSION PACKAGE

APPLICATION INSTRUCTIONS

Applications submitted in response to this RFP must include the items and be in the order as listed below. All of the items combined comprise your completed Application pursuant to this RFP.

1. Executive Summary: Complete as directed – indicate what program activity you are applying for.

2. Narrative Section: Complete and submit a response to the narrative section that fully addresses each of the evaluation criteria listed. The narrative must be typed in 12 point font, paginated on 8 1/2" x 11" white paper. The narrative section is limited to 12 pages.

3. Program Budget: Complete the line item budget forms for the services proposed (note - an electronic version of the EXCEL budget worksheet is available at www.vchsa.org). No other budget forms will be accepted. Matching resources (cash or in-kind contributions), if any as well as their source should be identified in the budget. The budget should be reasonable and accurate and provide a clear and concise description of your costs relating to the proposed project. Applicants should provide a narrative to justify their budget detail expenses.

4. Financial Audit: Please submit one copy of your most recent financial audit prepared in accordance with the applicable requirements of your fund source(s). For example, compliance with the Single Audit Act and 2 CFR 200 may be requirements relating to the preparation of your annual audit. If an audit has not been completed, your most recent tax return, 990 or financial statement may be substituted, as well as your prior year's audit. The audit will be reviewed to determine applicant's financial position, compliance with regulatory requirements and documentation of solvency. If within the last three years there has been an audit exception, disallowed cost and/or questioned costs for the performance of any government (*i.e.*, Federal, State, County) contract or grant, applicant must provide an explanation along with the audit.

5. Other attachments, as applicable (optional): Please include any supplemental information that will provide further information about the proposal or your firm, as applicable: *e.g* staff resumes, portfolio of media materials, *etc.*

It is the responsibility of the bidder to ensure the proposal is submitted by the time and date and location as specified. Postmarks will not be accepted in lieu of this requirement. Therefore, use of the U.S. Mail is at the bidder's own risk. Proposals submitted to any other office will not be accepted. To be considered for funding, all proposals submitted in response to this RFP must be received no later than **5:00 PM September 25, 2017** with **one complete application package with original signature and nine copies** excluding audit documents, either delivered in person or mailed to:

Tina Knight, Contracts & Grants Manager
County of Ventura
Human Services Agency
855 Partridge Drive, Ventura, CA 93003

Tina.Knight@ventura.org, 805-477-5442

Attachment 1-EXECUTIVE SUMMARY

1. Bidders Legal Name

Firm Name	
Address	
Telephone	Website address:

2. Program Name:

3. Funding Requested: \$

4. Briefly summarize your proposed program design (700 character max):

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5. Chief Executive Contact

Name of Chief Executive	
Title	
Telephone	email:

6. Primary Application Contact

Name of Primary Contact	
Title	
Telephone	email:

7. Legal Status Information

Federal Employer Identification (FIN)	
California Taxpayer I.D. No.	

An unsigned proposal will be rejected

I certify that the information provided in this proposal is true and correct to the best of my knowledge and that I have been duly authorized by applicants' governing body or other authority to file this proposal. This proposal is submitted as firm and fixed offer valid for 120 days of the submission date.

Signature: _____

Date: _____

Printed Name and Title: _____

Attachment 2 – NARRATIVE/REQUIRED SUBMITTAL ITEMS

Please provide a written response to each section. Your proposal will be reviewed and scored according to the following evaluation criteria. All proposals will be reviewed for demonstrated capacity to provide the services/activities sought through this solicitation.

1. Project Design and Implementation

40 points

- Provide a summary of your proposed layoff aversion service strategies and expected outcomes that addresses the allowable and requested services. (15 points)
- Identify specifically the implementation plan to provide incumbent worker services. Address how you will accomplish the required WIOA process. Please also identify if any subcontractors will be used. (15 points)
- Provide a work plan and implementation schedule for the recommended deliverables. (10 points)

2. Knowledge, Experience, and Performance

45 points

- Describe your firm's experience and qualifications in performing the services described in Section I. C. SCOPE OF WORK. Include information that demonstrates any experience and length of time in coordinating with business, education, organized labor, government and community-based organizations. (25 points)
- Provide an organization chart and a brief description of the qualifications and experience of members of your firm, including relevant subcontractors. Indicate how you will document the performance outcomes listed in Section I.D. PERFORMANCE OUTCOMES. (10 points)
- Describe your firm's ability to maintain accountable for contract funds and your internal control and oversight procedures. Describe your firm's history in successfully managing government contracts and/or federal pass-through subawards and/or contracts. If your firm has audit findings related to federal pass-through funds, please list them here along with your corrective action plan. If your firm has no findings in relation to federal pass-through funds, please make a statement to that effect in this section. (10 points)

3. Budget and Cost Effectiveness

15 points

- Provide a line item budget for conducting the proposed project, using the budget template included on the HSA website. (5 points)
- Identify any in-kind or cash contributions and/or other services that will be provided as part of this project and describe the anticipated added value of such contributions. (5 points)
- In the narrative, provide details to justify that costs are both necessary and reasonable and provide pertinent information that will help to evaluate the proposed project's cost effectiveness. (5 points)

Total Points 100

Attachment 3- BUDGET

Complete the line item budget attached to this RFP. An electronic version of the budget is available for downloading and use at <http://www.ventura.org/human-services-agency/request-for-proposal-rfps>.

Attachment 4- AUDIT

Include one copy of your most recent financial audit, IRS 990 form, or tax return.

Attachment 5- OTHER EXHIBITS, ATTACHMENTS AND/OR APPENDICES

Include any supplemental documents, resumes, job descriptions, letters of support, *etc.*, as applicable to support your application.



WORKFORCE DEVELOPMENT BOARD

855 Partridge Drive, Ventura, CA 93003

(805) 477-5306

workforceventuracounty.org

TO: EXECUTIVE COMMITTEE

FROM: REBECCA EVANS, EXECUTIVE DIRECTOR

DATE: MARCH 14, 2019

ACTION: RECCOMENDATION TO APPROVE THE OBLIGATION OF \$90,000 IN 2019-2020 CALIFORNIA WORKFORCE DEVELOPMENT BOARD (CWDB) REGIONAL PLAN IMPLEMENTATION FUNDS TO THE ECONOMIC DEVELOPMENT COLLABORATIVE, TO AUGMENT AND SUPPORT EXISTING LOCAL ECONOMIC DEVELOPMENT EFFORTS RELATED TO BUSINESS RETENTION AND LAYOFF AVERSION SERVICES AS DEFINED BY THE CWDB IMPLEMENTATION DESIGN WORK PLAN

Background

In September 2017, the California Workforce Development Board (State Board), in partnership with the Employment Development Department (EDD) and the Labor and Workforce Development Agency, announced the availability of approximately \$7 million dollars in Workforce Innovation and Opportunity Act (WIOA) discretionary funds for the Program Year 2017/2018. The State Board offered this funding for the Regional Planning Units (RPU's) to have the opportunity to apply for flexible funding to support the efforts toward implementing regional plan goals in alignment with regional plans.

In January 2019, the Workforce Development Board of Ventura County was notified of the approval of additional funding in the amount of \$180,000. This funding is for the grant period of April 1, 2019 through October 2020.

The prior RPI funding included a regional initiative for improving the coordination and efficiency of business outreach and communication with local businesses. The goal of that initiative is an improved alignment of the partners involved in business engagement. The primary focus has been to reduce duplication of business outreach efforts, assuring maximum value from all business engagements, efficiency in referrals among business services partners, and expand targeted outreach to high demand priority sectors.

Program Description and Performance Outcomes

The Regional Plan Implementation 2.0 will focus on aligning business services resources. Variety of objectives and outcomes to increase employer involvement, devise a system to merge and streamline employer feedback, and to develop a regional on-line branding and partner collaboration. The ultimate goal is that people have good jobs in industry recognized priority sectors.

Successful implementation of regional workforce system services requires informed and efficient outreach and communication with local business. The proposed project will leverage the resources of the region's Economic Development Corporation and Small Business Development Center, the RPU and America's Job Center to establish cross organizational training and processes and tools for

information sharing on business client needs and partner service offerings, coordination of leads and priorities, outcomes and follow-up needs.

The regional collaboration is key, and will be looking to the implementation of effective inter-organizational communication and information sharing strategies and tools to enhance both unique program effectiveness and greater regional success in business, economic and workforce outcomes.

The proposed project will leverage the resources of the region's Economic Development Collaborative and Small Business Development Center, the RPU and America's Job Center to establish processes for improving the capacity of all business services partners for:

- the assessment of business demand for skills,
- identification of regional occupational skill deficits,
- development and delivery of curricula for both new hire and incumbent worker training, and
- delivering efficiency through the network of regional placement services for in-demand jobs and careers.

Outcomes:

- Enhance the emerging communication and information sharing network for business engagement to include career, occupational and training needs assessment tools and protocols for the region's partners in business outreach and engagement.
- Improved regional and systemic coordination of business outreach to the region's high demand sectors, as defined by the WDB and regional partners.
- Coordinated regional outreach and delivery of training resources to businesses, for new hires and incumbent workers, including On-the-Job Training, CA Employment Training Panel, CA Community College Sector Navigator and Strong Workforce, Career Pathways, etc.
- Establishment of a Council of Business Services Partners, concentrated on the delivery of career services and employment outcomes.
- Establishment of a sustainable communication structure with Community College and Adult School Industry Advisory Councils for connecting the career services and training needs intelligence gathered through the on-going business services engagement conducted by the regions business services partners.

Alignment with State and Regional Strategic Workforce Plans Regional Planning Unit Grant Priorities:

The proposed activity is wholly in alignment with State and Regional Strategic Plans and the RFP's concentrations on:

- establishing uniform approaches to business services,
- fostering demand-driven skills attainment, and
- aligning, coordinating, and integrating programs and service to economize limited resources to achieve scale and impact.

Because of the urgency in expending RPI funds by October 2020, and the WDB commitment to doing so in a responsible manner, the Executive Committee will have to review, discuss and recommend to the WDB board.

The Economic Development Collaborative is expected to begin program operations July 1, 2019, following approval by the Board of Supervisors, and funds would have to be fully expended by October 2020.

If you have questions or need more information, please call me at (805)477-5306.



WORKFORCE DEVELOPMENT BOARD

855 Partridge Drive, Ventura, CA 93003

(805) 477-5306

workforceventuracounty.org

TO: EXECUTIVE COMMITTEE

FROM: REBECCA EVANS, EXECUTIVE DIRECTOR

DATE: MARCH 14, 2019

SUBJECT: RECOMMENDATION THA THE WORKFORCE DEVELOPMENT BOARD OF VENTURA COUNTY RECOMMEND COUNTY BOARD OF SUPERVISORS APPROVAL OF THE VENTURA COUNTY WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) REGIONAL AND LOCAL WORKFORCE DEVELOPMENT PLANS UPDATE FOR PROGRAM YEARS 2017-2021 – TWO YEAR MODIFCATIONS

BACKGROUND

Under WIOA, a biennial update of regional and local plans is required in order to ensure plans remain current and account for “changes in labor market and economic conditions or in other factors affecting the implementation of the local plan” (29 U.S. Code § 3123). The California Workforce Development Board (State Board) has also made changes to the State Plan, which require that Local Boards update their plans to keep them consistent with the policy direction of the State Plan. Pursuant to the State Plan modifications submitted to the U.S. Department of Labor in the spring of 2018 and approved on June 11, 2018, the State Board provided guidance to Local Boards on the requirements associated with local and regional planning modifications. (Regional and Local Plans PY 17-21- Two Year Modifications, WSD-18-01)

The Directive (WSD-18-01) for the local and regional plan modification includes conditions and processes for stakeholder engagement during the regional and local plan modification process and the following:

- Required and elective regional plan modifications to align, coordinate, and integrate reentry and workforce services to the formerly incarcerated and other justice-involved individuals.
- Required and elective local plan modifications arising from regional or local partnerships with county human service CalFresh programs.
- Required and elective local plan modifications arising from regional or local partnerships with Local Child Support Agencies (LCSAs) to provide workforce services to unemployed, underemployed, and payment-delinquent non-custodial parents.
- Required and elective local plan modifications arising from regional or local partnerships with programs that serve individuals with disabilities, including detail on strategies to implement Competitive Integrated Employment.
- Required and elective local plan requirements pertaining to services for English Language Learners, the Foreign Born, and Refugees.
- Required regional plan content detailing compliance with State Plan guidance and state law relating to Multi-Craft Core Curriculum (MC3) pre-apprenticeship partnerships.
- Required regional self-assessment using Indicators of Regional Coordination and Alignment.

DISCUSSION

The Workforce Development Board followed the plan modification public process and stakeholder engagement as defined in WSD18-01. The Regional and Local Plan Modification includes information gathered from numerous stakeholder/public meetings.

If you have questions or need more information, please call Rebecca Evans WDB Executive Director, at (805) 477-5306.

SECTION 2 REGIONAL PLAN UPDATE

Introduction

The Ventura County Board of Supervisors is the governing body that oversees the County's Human Services Agency, in which the activities of the Workforce Development Board of Ventura County (WDBVC) are embedded. The WDBVC is a separate, independent board appointed by the Board of Supervisors, and is the Regional Planning Unit for Ventura County. In February 2017, the Workforce Development Board of Ventura County (WDBVC) submitted a four-year **WIOA Regional Plan** to the California Workforce Development Board. That plan, in tandem with a **WIOA Local Plan** submitted at the same time, outlined the County's vision, objectives and strategies for supporting an appropriately-skilled workforce ready and able to meet the changing business needs of area employers. In the Regional and Local Plans, and consistent with the goals and objectives outlined in the California Workforce Development Board's State Plan, "*Skills Attainment for Upward Mobility; Aligned Services for Shared Prosperity*," the Board described three primary policy objectives: fostering demand-driven skills attainment by aligning regional education programs with industry sector needs; enabling upward mobility for all Ventura County residents; and aligning, coordinating and integrating programs and services to economize limited resources.

That four-year Regional Plan was developed over a period of six months, with the active participation of several dozen agencies and organizations, as well as many private individuals, in a total of 75 public meetings. All of those organizations and individuals, as well as many others, were invited to participate in the development of this two-year update to the Regional Plan. Some participated in a series of focused planning meetings regarding the Prison to Employment initiative; others attended an evening meeting to review the plan update process, the State Board's priorities, and new regional collaborations. A number of organizations provided written comments. The result is this **Two-Year Regional Plan Update** which addresses CWDB's guidance and expectations while meeting the County's need to make plan adjustments and modifications in response to conditions in the region.

To augment the stakeholder input collected in the series of meetings described above, WDBVC engaged the services of a consulting firm with particular expertise in re-entry services for justice-involved populations. CausalIMPACTS facilitated six of the planning meetings, compiling and inviting a list of 170 individuals, representing more than 51 unique organizations serving justice-involved individuals in the region. CausalIMPACTS also designed and implemented a stakeholder survey, an employer survey, one-on-one interviews with 21 practitioners, and focus groups with justice-involved individuals.

A detailed description of WDBVC's regional plan update process is included as **Attachment A: Stakeholder Engagement and Community Outreach Efforts**. The Local Board has a strong track record of community engagement, and supports the state's desire to do more than simply comply with public notice requirements. To ensure that the interests of customers were central, the WDBVC utilized the California Workforce Association's approved provider list to identify a consulting firm with specific expertise in community engagement, the Corporation for a Skilled Workforce. The consultant first met with WDBVC staff in November 2018; a series of meetings began the following month, some of them public, some internal working sessions, culminating in an evening public meeting on January 31, 2019, which in turn triggered a 30-day public comment period. WDBVC and its stakeholders view this regional plan update process as a welcome opportunity to connect the workforce and corrections systems in a way that has not been done before. We support the state in this goal, and look forward to working together to make a real difference in the lives of justice-involved residents of Ventura County.

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Workforce-Corrections Partnerships

A number of workforce-corrections partnerships currently exist in Ventura County, most of them focused on a particular program, or a specific referral relationship between two or more agencies. The Human Services Agency's Adult and Family Services Department has long partnered with the Ventura County Probation Agency and the Ventura County Sheriff's Office to support a series of initiatives aimed at the reintegration of ex-offenders. The **Re-Entry Council**, which originally formed as a result of a Workforce Accelerator Fund grant, has served as the primary vehicle for coordinating many of these efforts.

This Regional Plan Update heralds a new and more comprehensive level of partnership, one which endeavors to bring the workforce development system as a whole in alignment with the needs of all justice-involved Ventura County residents. It incorporates and builds upon existing partnerships, and proposes an expanded, revitalized and (for the first time) *staffed* Re-Entry Council as the centerpiece of a genuinely wholistic workforce-corrections partnership.

The VCWDB is fully committed to not only offering but *targeting* services to those who face the greatest challenges in the labor market. The priority placed on building upward mobility for low-income residents means an emphasis on reaching and serving those with low educational levels and/or limited prior work experience. Women who have not previously worked outside the home are a priority target population. People with criminal records face perhaps the greatest challenges of all in the labor market, with the stigma of incarceration on top of the usual educational barriers, skills deficits, and support service needs. As the county's provider of Medi-Cal, CalFresh and General Relief services, the Human Service Agency brings access to those programs and supports to the incarcerated and post-release population.

The new focus on trying to reach all Ventura County CalFresh recipients, discussed in detail in the Local Plan Update, reflects an unprecedented emphasis on targeting workforce services to low-income residents. Individuals who currently have no income, or are working in low-wage jobs, are a priority as well, and the WDBVC Local Plan Update outlines a strategy of designing and offering "earn and learn" opportunities, such as apprenticeship, OJT and other forms of paid training, as a key response. Similarly, the WDBVC's P2E Plan incorporates models which provide trainees with income while they are in training. WDBVC sees the commitment to connect the workforce and corrections systems and the commitment to serve low-income residents as part-and-parcel of the same imperative: moving the needle on poverty in Ventura County.

Under the leadership of the Re-Entry Council and the WDBVC, Ventura County has piloted several programs targeting justice-involved individuals, primarily as iterations of the Specialized Training and Employment Project for Success (STEPS) program. At present, the STEPS-Adult program serves 92 AB109 individuals annually, while the STEPS-Youth program serves another 79 non-AB109 individuals age 16-24.

Given the track record and relationships established over the various incarnations of STEPS, the WDBVC anticipates utilizing a portion of P2E funding (and other new funding that may become available) to continue to build the capacity of the STEPS model. At the same time, there is a widely-recognized need to go beyond STEPS, to offer broader opportunities and to reach more of the non-AB109 population. WDBVC intends to address this by using **an RFP to select community-based providers** with a proven

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track record of connecting this population to employment, and anticipates awarding a significant portion of P2E funding to such organizations.

Ventura County's P2E stakeholders have been meeting since August, 2018, and have identified multiple barriers, challenges and needs, including housing for ex-offenders, more sober-living and drug treatment options, more paid training, and more opportunities for direct placement into employment. While there are a number of organizations in the county providing social services and various kinds of hard- and soft-skills training for ex-offenders, there are relatively few that offer paid training, OJT, or direct job placement. In accordance with the P2E Regional Plan, which was prepared in tandem with this regional update and is being submitted to the state simultaneously, the WDBVC and its numerous corrections and community partners are proposing several new initiatives, beginning with an expanded and revitalized Re-Entry Council and stronger support for a community-based approach to connecting ex-offenders with employment.

Ex-offenders face many of the same barriers to employment experienced by low-income residents in general (low educational levels, lack of training, lack of work history), as well as additional barriers created by the simple fact of their criminal record. Most employers are reluctant to take a chance on someone with a record. Even something as basic as the lack of a driver's license, state identification card, or a specific professional license becomes a huge obstacle. To overcome these barriers, ex-offenders need a comprehensive support system of educational enhancement, skills training in high-demand occupations, earn-and-learn opportunities, case management, and support services ranging from mental health counseling and housing assistance to transportation and post-placement career guidance.

At present, these services are provided through a handful of relatively small programs, and fall short of reaching all of those who could use assistance. P2E funding gives us the opportunity to move beyond individual programs to create a comprehensive *system* which offers workforce and supportive services to each incarcerated individual – while they are still incarcerated – and follows them, via a 'warm' hand-off immediately upon release, with all of the supports they are likely to need to be successful on the outside. Ventura County's P2E proposal includes funding for academic and career counseling, subsidized childcare and dependent care, transportation vouchers, books, uniforms, equipment, substance abuse treatment, and assistive technology for people with disabilities. Supportive services must be necessary, reasonable, and employment-related, and will be targeted to those most in need by starting outreach (more accurately: 'in-reach') 60-90 days prior to release.

The Parole and Probation offices, partners in the Re-Entry Council for many years, have been actively involved in the development of this Regional Plan Update and the P2E Regional Plan. The state's focus on using these plans to establish stronger connections between the workforce system and the corrections system presents us with a welcome opportunity to take that partnership to a new level. All of the stakeholders involved in this plan update process agree that providing workforce services to individuals while they are still incarcerated is the best way to ensure success. Certain policies restricting service for "short-timers" currently prevent us from reaching a significant portion of the incarcerated population, but we are working together to pursue modifications to those rules. Even individuals who won't be incarcerated for long could benefit from meeting with a career counselor, and perhaps participating in short work-readiness training. Those who face longer sentences can receive more in-depth educational services or job skills training.

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At present, intake and case management needs for the justice-involved population are handled by trained staff at the AJCC, typically as part of the enrollment process for one of the STEPS programs. Individuals are assessed for educational levels, skills, and interests, and are guided toward the program or service that is most appropriate for their needs. Case managers receive records from the corrections facility regarding the education and training each individual received during incarceration, and are able to base an Individual Employment Plan on that foundation.

One gap that has been highlighted during this regional planning process concerns justice-involved individuals who are served by the AJCC, but who are not necessarily enrolled into one of the specific STEPS program targeted to that population. Many justice-involved individuals receive basic career counseling at the AJCC, and are assisted with resumes and pointed toward services and job openings, but are not counted in the totals of justice-involved individuals served, simply because they are not part of STEPS.

In the future, as a result of agreements developed during this plan update process, the AJCC will track all self-identified justice-involved individuals, not just those enrolled in specific re-entry programs, and will share data with partners regarding overall service to the target population. Data regarding all justice-involved individuals will be tracked in accordance with the state's new performance reporting requirements, and will be shared on an ongoing basis among all partners to ensure accountability and continuous improvement. Data sharing agreements and client release of information will allow Parole and Probation to share appropriate data with partners, ensuring that users have access to information as appropriate.

Once a justice-involved individual has been placed in a job, it becomes imperative to protect the investment that has been made in that person by providing them with all of the supportive services they need to be successful. It is critical to follow up with those new employees, and with their employers, on a regular basis to ensure that misunderstandings or minor issues do not become major problems leading to loss of employment. WDBVC anticipates that a significant number of ex-offenders placed in employment will encounter post-placement workplace or home-life issues, and is committed to assisting both the worker and the employer to ensure a successful transition to long-term employment.

The WDBVC has fully embraced the strategy of focusing on regional industry sectors as a way of meeting employer needs and advancing Ventura County job-seekers. The WDBVC's WIOA Regional Plan outlines four sector committees, which form the backbone of its work to match job-seeker skills and employer needs. These include the Manufacturing Committee, the Clean/Green Committee, the Health Care Committee, and the Business Services Committee.

Ventura County's **Specialized Training & Employment Project for Success**, or **STEPS**, has evolved through various iterations and funding streams over several years. The initial STEPS-Adult (AB109) and STEPS Youth (Youthful Offender Block Grant) programs were funded by the **Probation Department**. The STEPS-Adult program served 132 individuals between July 1, 2017 and November 30, 2018. The STEPS-Youth program served 71 individuals during that same time frame. (At present, the two programs are serving 92 and 79, respectively.)

WDBVC's first **Accelerator** (Workforce Accelerator Fund) grant allowed WDBVC to improve the STEPS-Adult program through a strategic planning process that led to strengthened partnerships. A second Accelerator grant was utilized to develop marketable training services for ex-offenders to improve entry

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into the labor market by addressing the workforce needs of local manufacturing employers. WDBVC and partners developed a six-week 90-hour fee-based Manufacturing Readiness Skills Training Program at Ventura Community College and explored other funding options to expand the training.

A funding opportunity eventually became available through **Forward Focus** (AB2060). Stakeholders had determined that ex-offenders required immediate engagement in program services, ongoing employment coaching/counseling and a responsive supportive services system; any significant delay or gap in services negatively impacted their participation. A delay in starting classes, a lack of spouse/family support, a lack of transportation or a long wait list for mental health/drug treatment services contributed directly to the drop-out rate. Those fully engaged in employment or in OJT, however, demonstrated eagerness to learn and stuck with the program. In the manufacturing class, nearly 50% completed the training; in the STEPS-Adult program, 78% obtained a job.

STEPS Connections, funded under Accelerator 6.0, expanded prior Accelerator activities from the adult AB109 ex-offender population to include 35 STEPS-Youth participants (16-24) while also bringing in additional partners. STEPS Connections does not independently enroll participants; instead it strengthens partnerships to support an integrated and responsive system for this population, develops tools and resources to strengthen participation and employment outcomes, and has developed a “best practice” guide to share the lessons learned during the project.

STEPS Connections included funding for a lead Employment Services Specialist who operates as an “ex-offender Navigator” for the system and coordinates with STEPS-Youth and STEPS-Adult, which has been critical in identifying issues and creating strong working relationships, given that STEPS-Youth is located at the Probation office while the navigator works at the America’s Job Center of California (AJCC) and has access to information affecting youth participation. STEPS-Youth provides supportive services and has access to other services as appropriate from the AJCC. STEPS-Youth program staff offer Job Readiness Workshops, case management and other employment services at Probation’s new Youth Day Reporting Center.

STEPS Connections creates a comprehensive and integrated “One Stop” supportive services system for ex-offenders by strengthening provider relationships. The Re-Entry Council, created under the initial WAF 1.0 project and now expanded through this Regional Plan Update process, plays a key role in developing and supporting this system. The members of the council are key stakeholders in positions that can influence system change, including leaders of organizations that fund organizations providing support services to the ex-offender population. Their input in this project, together with that of industry representatives, will play a key role in driving system change. These include the Chief Deputy, Probation; Todd Road Jail Commander, Sheriff’s Department; Field Services Manager, EDD-WS; Director of Workforce Services, Goodwill Industries; Interface Children and Family Services; HSA Manager and Ex-Offender administrator, and several representatives from other nonprofit organizations. Since the ultimate objective is to improve marketable skills for the labor market, employers will continue to have strong representation on the expanded Re-Entry Council. The revamped Council plans to meet bi-monthly, and to hold quarterly cross-training sessions for member organization staff and others on a range of corrections/workforce-related topics.

The Todd Road Jail, operated by the Ventura County Sheriff’s Office and serving male inmates, is currently the site of a successful **food handler training program**. Discussions pursuant to this Regional

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Plan Update and the drafting of Ventura County's P2E Regional Plan have resulted in an agreement to utilize P2E funding to enhance that program with additional employer-validated credentialing, and to replicate the model in a new field: **landscaping and grounds maintenance**.

Another need identified during this planning process involves the information provided to ex-offenders describing resources and supports available to them as they re-enter. Stakeholders prioritized the creation of a standard **Re-Entry Toolkit**, to be handed to each individual, with clearly-written materials describing the various programs and services they are entitled to, not just as ex-offenders but as residents of Ventura County. These files and documents will also be backed up in a digital record, allowing individuals to access their paperwork even if they misplace the hard copies. Ex-offenders need to understand that they are not 'on their own,' and that there is in fact a system of supports and a network of providers that welcomes them.

Long waitlists and an apparent shortage of approved **sober living options** for ex-offenders, both AB109 and non-AB109, was highlighted as a significant gap during the planning process. At present, only two providers are contracted by the Ventura County Probation Agency, limited to AB109 clients; both generally have long waiting lists. Other options, however, do exist in the community. As a result, WDBVC is proposing, as part of its P2E Regional Plan, a vetting process to expand the list of approved providers through master agreements and micro-contracts with pre-approved vendors.

WDBVC strongly supports apprenticeship and pre-apprenticeship models as a pathway for low-income residents, including ex-offenders, to achieve income mobility. To have value, pre-apprenticeship programs must lead to an approved apprenticeship. Ventura County embraces the **High Road** approach, and currently has a Multi-Craft Core Curriculum program, developed in partnership with the building trades, at the Architecture, Construction & Engineering Charter High School in Camarillo. During the development of this Regional Plan Update, the WDBVC met with multiple unions and Ventura Community College to discuss starting a new MC3 program. The college had already been exploring the idea, and with the support of the unions and the WDBVC, was encouraged to pursue it as an MC3 model. The new pre-apprenticeship program, focused on entry-level residential building skills, will be reviewed by the WDBVC, with an anticipated start date of late Spring.

The Community College District is a primary partner in the Ventura County workforce development system, with a heavy emphasis on designing programs that meet employer needs by ensuring students develop the basic and advanced skills required for family-sustaining employment. Integrated education programs, such as the pre-apprenticeship program currently in development, combine literacy, numeracy, civics and job skills in a model that accelerates learning gains. In addition to residential building, occupations include care-giving, entry-level manufacturing/assembly, and a Spanish-language agricultural supervisor training program that incorporates ESL. The community colleges complement the basic education services offered at the Adult Schools by bringing advanced technical instruction to the table, with a commitment to ensuring that all students successfully meet basic English and math standards by the end of their first year of college.

WDBVC conducted extensive, in-depth labor market analysis to identify the sectors it prioritized for workforce development services, and has organized its committee structure around those sectors. The Manufacturing Committee, the HealthCare Committee, the Business Services Committee and the Clean/Green Committee all focus on providing Ventura County job-seekers with the skills needed by

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employers in those sectors. Board and committee meetings are public, and stakeholders are actively engaged, in an ongoing basis, on reviewing LMI data, confirming it with employers in each sector, and designing services that keep pace with the needs of both sets of customers: job-seekers and employers. Partners receive their information about priority industry sectors through participation in this committee structure, and use the committees to provide input into the Board's decision-making. For example, the Ventura Community College has a robust and sophisticated labor-market analysis operation of its own, which it routinely brings to the table in discussions with the Board. Going forward, re-entry placement data, by sector and wage, will be incorporated into regular reports to each of the sector committees.

Successful provision of workforce services to the justice-involved population requires applying an additional lens to our labor market analysis. Identifying high-growth industries with good wages is critical, but it is equally essential to examine the business practices in each sector regarding the hiring of individuals with criminal records. As part of the P2E Regional Plan process, CauseIMPACTS conducted an analysis of labor market data and re-entry challenges for Ventura County and concluded that while some sectors are less corrections-friendly than others, there are significant opportunities to expand employer engagement in this area. Manufacturing and Clean/Green are two sectors where employers have shown a willingness to consider ex-offenders, and are experiencing labor shortages that could work to the benefit of the re-entering population. It is also possible that some good jobs for ex-offenders may be found in industries, such as culinary, that have not been selected as high-growth focus areas by the board; it will be important to remain flexible and adaptable as such opportunities arise.

Health care is another sector worth exploring, with many job openings in positions with good wages. Most health care employers, however, have blanket policies against hiring individuals with criminal records. This has the effect of shutting many individuals out of positions they have the aptitude for, jobs they could perform well if given the chance. There are examples, in other parts of the country, where workforce partners have induced health care employers to adopt more rational hiring policies, whereby low-level offenses are not treated the same as violent crimes, and are not cause for automatic rejection. Given the strength of this sector, and the potential it holds for job-seekers, the WDBVC intends to explore with individual employers, and with the sector as a whole, the possibility of piloting more flexible HR policies in Ventura County. We would welcome the state's leadership on this issue, as it will take a major public challenge to change the business practices of such an enormous industry.

Through its STEPS programs, and related efforts, WDBVC has compiled a list of several dozen employers who have expressed willingness to hire formerly-incarcerated or justice-involved individuals. The number who are actively hiring, of course, is much smaller, and STEPS historically has relied on 8-10 relatively reliable employer partners. Clearly, if the workforce system is to serve more justice-involved job-seekers, it needs to dramatically expand our employer outreach. A list of employers who are theoretically "felon-friendly" is fine, but it is the actual hiring (and retention) of employees that counts. Moreover, while some employers are willing to have it publicly announced that they hire ex-offenders, others are willing to make such hires only on the condition that it *not* be made public. What is needed is a strategy for accommodating the wishes of both kinds of employers.

Employer outreach for the P2E planning process highlighted the fact that many businesses are not actually clear about their own hiring policies. Local employers who were part of large chains often did not know their headquarters' official position on hiring people with criminal records. Some employers

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seemingly assume they cannot hire ex-offenders, and screen them out as a matter of course, without ever having pursued the matter. And as indicated above, many are simply uncomfortable even discussing the topic. However, the economy and the labor market are pushing more employers to rethink their policies, creating potential new opportunities for the population. The combination of low unemployment and high demand makes this the ideal time to educate employers.

This Regional Plan Update, in accordance with the P2E Regional Plan, proposes the creation of a new **Employer Outreach** position which will centralize Ventura County's approach to recruiting employers and educating them about the benefits of hiring ex-offenders. At present, multiple organizations conduct their own independent business outreach on behalf of job-seekers with criminal records, sometimes through partners in the workforce system. While loosely connected, these separate approaches are not always effective in assuring lateral partner-to-partner communication or achieving positive employment outcomes.

Instead of having multiple agencies and organizations independently approaching the same employers on behalf of re-entering clients, WDBVC proposes to utilize P2E funding to implement an efficient and coordinated and centralized effort which respects the needs, and the valuable time, of our employer partners. Convincing an employer to take a chance on an ex-offender is a prospect that cannot be taken lightly; it requires concerted and thoughtful effort by a highly professional and trusted staff. The employer needs to know that the candidates they are considering have been educated, trained and vetted, and that the organization standing behind them will continue to do so well after they are hired.

Appealing to the social conscience of employers has its place, but the real key to engaging significant numbers of employers is convincing them that hiring ex-offenders makes good business sense. Fortunately, there is plenty of evidence indicating that ex-offenders tend to become extremely loyal and highly-valued employees, reducing turnover costs and contributing measurably to the bottom line. Since the best messenger for this kind of news is often another employer, we will utilize employer champions to help their peers understand the tangible benefits of hiring individuals with criminal records.

Included in those benefits, of course, are the state and federal tax incentives, credits and other benefits to which employers who hire ex-offenders are entitled. Most employers do not know about these incentives, and even when they have heard about them, they tend to assume that the bureaucratic 'red tape' involved will cost more than it is worth. For example, few employers surveyed are aware of the Department of Labor's ex-offender bonding program, which protects employers for the first six months of an ex-offender's tenure. Again, other employers are probably best-positioned to deliver this message, so we will enlist our current employer partners to help us craft simple, self-explanatory marketing materials.

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Multi-Craft Core Curriculum Pre-Apprenticeship Partnerships

The Workforce Development Board of Ventura County strongly supports the state's emphasis on apprenticeship and pre-apprenticeship models as vehicles for residents to achieve income mobility. By definition, pre-apprenticeship only works if it is connected to actual apprenticeship opportunities; otherwise, it is not really "pre-apprenticeship." Ventura County embraces the Multi-Craft Core Curriculum model, and currently has a strong MC3 program, developed in partnership with the International Brotherhood of Electrical workers and related trades, which operates at the Architecture, Construction & Engineering Charter High School in Camarillo, moving Ventura County residents into living wage apprenticeships leading to well-paid journeyman positions.

In June of 2018, the WDBVC met with the Laborers International Union, the International Brotherhood of Electrical Workers, and the Community College District to discuss starting a new MC3 program. The community colleges had been exploring something similar, and with the encouragement of the unions and the WDBVC, were convinced to pursue it under the Multi-Craft Core Curriculum. The new program will focus on entry-level residential building skills, with an English-Language Learner component. The unions have worked with the community colleges over the past several months to collect the required information from the various building trades. The new pre-apprenticeship program will be reviewed by the WDBVC shortly and is anticipated to start in late Spring.

On behalf of both MC3 programs, the WDBVC and its partners will focus on recruiting participants from underrepresented populations such as women, veterans and justice-involved individuals. Going forward, the Board will remain engaged with the MC3 programs and their labor partners to ensure that the workforce system fully supports the apprenticeship model, and that participants have access to all of the services to which they are entitled.

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Regional Coordination and Alignment Indicators

As both a local workforce area and a region, Ventura County is perhaps spared some of the complexities faced by multi-county regions, as well as by counties containing multiple workforce boards.

Nevertheless, the regional planning process that WDBVC has engaged in, starting with passage of WIOA and continuing through the implementation of Regional Planning Units, has pushed the Board to think more regionally, and to address itself to the broader systemic questions raised in the ongoing regional planning process. **An updated Indicators of Regional Coordination and Alignment document is attached.** It indicates that while progress has been made on some measures, there is still work to be done.

It is worth noting that WDBVC does regularly partner with our contiguous regions. For example, Ventura County is a partner in the Los Angeles region's Slingshot initiative, focused as it is on one of our key industries, health care. Many of our services reach into Santa Barbara/Mid-Coast Region, and some of our residents participate in programs there. Notably, the nearest day-reporting center for adult probationers is located in Santa Barbara, requiring ex-offenders to travel there on a regular basis – a situation the WDBVC hopes to remedy.

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Appendix A: Community Engagement and Outreach

Stakeholder engagement in the Regional Plan Update process began early, in June 2018, with a convening of corrections partners by the WDBVC to discuss with the Prison to Employment planning process. That led to the engagement of CauseIMPACTS to conduct a community planning process, as well as the engagement of Corporation for Skilled Workforce to bring that corrections partnership work into the Regional Plan Update process. For nearly six months, from November to March, the two consulting firms worked together to ensure broad stakeholder input and consistency across the various planning documents.

A planning meeting with the AJCC Director and staff of the STEPs Program took place on December 11th. It was followed on January 9th by a kick-off meeting of more than 40 corrections, workforce and community stakeholders, the first of several “Partner Coalition” meetings. CauseIMPACTS conducted intensive outreach for this series of sessions, contacting more than 140 organizations, including those provided by CWDB. Numerous individual phone calls and reminders were used to ensure attendance and participation by each category of partner outlined in the state directive, including CDCR/State Parole, Ventura County Sheriff’s Office/County Probation, training providers, other local service providers, labor unions, community colleges, and community-based organizations. Several employers attended the kick-off meeting, and participated in subsequent workforce/corrections conversations.

The next meeting of the corrections-workforce coalition group was on January 31st. The following evening, January 31st, a public meeting was held at the AJCC to outline both the Regional and Local Plan updates for interested parties. The Re-Entry Council met on February 6th, with a presentation by CauseIMPACTS on the regional planning work. A public meeting devoted specifically to the workforce-corrections partnership was held on February 13th. On March 6th, the final public meeting was held prior to plan submission. As the attached notices indicate, the State Board was informed of all public meetings. Throughout this intensive planning process, multiple draft documents were produced and reviewed by stakeholders and other interested parties, who were given various opportunities to vote on priorities.

In addition to the meetings described above, stakeholders were engaged by means of a stakeholder survey, an employer survey, a focus group of justice-involved individuals, and individual interviews with service providers and corrections officials. These conversations added depth to the planning process, and identified several new opportunities for collaboration. In total, 91 individuals representing 51 unique organizations participated in the regional planning process.

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Appendix B: Workforce/Corrections Partnership

As noted in the Prison to Employment legislation and elsewhere, the term “justice involved” refers to individuals who are on parole, probation, mandatory supervision, or post-release community supervision and are supervised by or are under the jurisdiction of, a county or the California Department of Corrections and Rehabilitation. This also includes individuals who are on county informal probation, county deferred entry of judgement, or any other county diversion programs such as drug courts, veterans courts, community courts or other specialty courts.” There are nearly 34,000 actively justice-involved individuals in Ventura County. In addition, there are an estimated 42,000 formerly-incarcerated individuals living in the county, bringing the potential overall target population to approximately 76,000. Since the stigma of incarceration is real and long-lasting, it is critical to focus on both groups.

- **33,561** actively justice-involved individuals in Ventura County
- Extrapolating from national figures, an estimated **42,000** “formerly incarcerated” individuals
- **76,000 currently or formerly justice-involved** individuals in Ventura County

The vast majority of the actively justice-involved individuals are already living in the community, including 737 on active state parole, 26,165 on probation, and 3,175 in County diversion programs. Adults on probation comprise the single largest justice-involved subpopulation in the County, accounting for 76% of the total figure. An additional 3,850 individuals from Ventura County are currently detained, including 1,662 in county jail and 1,822 in CDCR state prison facilities. The table on the next page summarizes data on the size of the current justice-involved population in Ventura County. Analysis of the size and demographic characteristics of Ventura’s justice-involved population reveals a number of interesting trends:

- **79%** of the active justice-involved population are adults on probation
- **76%** of justice-involved individuals in Ventura County are men
- **60%** of the justice-involved population are Hispanic and/or White men of prime working age (25-50 years old)
- **African-Americans and Latinos/Hispanics are noticeably overrepresented** compared to their percentage of the general population.
 - African-Americans make up 2.3%¹ of the overall population in Ventura County, but account for 4.7% of the justice-involved population.

The majority of the justice-involved individuals in Ventura County are adults between the ages of 25-50 years old (66%), followed by 18-24 year-olds (16%). These groups represent individuals of prime working age who are a potential source of employees for local businesses looking to address labor shortages.

¹ <https://www.census.gov/quickfacts/venturacountycalifornia>

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- Hispanics/Latinos make up 42%² of the county population, but account for 62% of the justice-involved population.

Justice-Involved Population in Ventura County			
	<i>Total</i>	<i>Youth</i>	<i>Adults</i>
<i>On Diversion</i>			
In County Diversion Programs	3,175	466	2,709
<i>On Supervision</i>			
On Probation	26,165	610	25,555
On Parole	737	0 ¹	737 ¹
<i>In Detention</i>			
In County Jail (Detention only)	1,662	85 ²	1,577 ²
In State Prison	1,822	7 ²	1,815 ³
TOTAL Justice-Involved	33,561	1,168	32,393
<p><i>All data is for 2018 calendar year, via data reported to causeIMPACTS, Jan 2019, unless indicated.</i></p> <p><i>[1] As of Dec 2018 via CDCR DAPO figures reported to causeIMPACTS, Dec 2018. Note, there are no youth on parole in the state of California. All juvenile offenders released from DJJ facilities go to County probation agencies</i></p> <p><i>[2] As of Dec 2016 via CJCJ raw data files at http://casi.cjcj.org/about.html#download</i></p> <p><i>[3] As of Feb 2019 via CDCR Office of Research reported to causeIMPACTS, Feb 2019.</i></p>			

² <https://www.census.gov/quickfacts/venturacountycalifornia>

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Introduction

In February 2017, the Workforce Development Board of Ventura County (WDBVC) submitted a four-year **WIOA Local Plan** to the California Workforce Development Board. That plan, in tandem with a **WIOA Regional Plan** submitted at the same time, outlined the County's vision, objectives and strategies for supporting an appropriately-skilled workforce ready and able to meet the changing business needs of area employers. In the Local Plan, which remains in effect through 2020, the Board described three primary policy objectives: fostering demand-driven skills attainment; enabling upward mobility for the Ventura County workforce; and aligning, coordinating and integrating programs and services to economize limited resources. These are consistent with the goals and objectives outlined in the California Workforce Development Board's State Plan, *"Skills Attainment for Upward Mobility; Aligned Services for Shared Prosperity."*

A total of nineteen AJCC partner organizations signed Memoranda of Agreement in accordance with that plan, and have subsequently worked closely to build an integrated and fully-aligned workforce development system in Ventura County. The AJCC's co-located partners, which include EDD, HSA/CSD and CalWORKS/TANF, have identified ways to deliver services efficiently and effectively through the use of shared data systems and in-person collaboration on items such as staff coordination, joint training, and the delivery of workshops to shared populations. Each of the mandated partners has relationships with multiple community-based organizations that have themselves become integrated into the AJCC constellation of services for specific target populations; new CBOs are solicited on an ongoing basis as appropriate.

The four-year Local Plan was developed over a period of six months, with the active participation of several dozen local agencies and organizations, as well as many private individuals, in a total of 75 public meetings. Each of those organizations and individuals, as well as many others, were invited to participate in the development of this two-year update to the Local Plan. Some participated in an evening meeting to review the plan update process, the State Board's priorities, and new local collaborations. Others provided written material or took part in one of several smaller meetings on specific topics related to the plan updates. The result is a Two-Year Local Plan Update which addresses CWDB's guidance and expectations while meeting the County's need to make plan adjustments and modifications in response to local conditions.

A detailed description of WDBVC's plan update process is included as **Attachment A: Stakeholder Engagement and Community Outreach Efforts**. The Local Board has a strong track record of community engagement, and supports the state's desire to do more than merely comply with public notice requirements. Toward that end, the WDBVC utilized the California Workforce Association's approved provider list to identify a consultant with specific expertise in community engagement. The consultant first met with WDBVC staff in November; a series of meetings began the following month, some of them public, some internal working sessions, culminating in an evening public meeting on January 31, 2019, which in turn triggered a 30-day public comment period.

WDBVC and its stakeholders view this plan update process as a welcome and unprecedented opportunity to address poverty in Ventura County in a meaningful and measurable way by focusing the workforce system on the needs of those most in need of its services. We support the state in this goal

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of building upward mobility, and look forward to working together to make a real difference in the lives of low-income residents of our county.

CalFresh E&T Partnership

The centerpiece of this Local Plan Update is a new working relationship between the WDBVC and Ventura County Human Service Agency's CalFresh operation. While past collaborations in this arena have centered on relatively small, specific target populations (CalWORKS participants; work-mandated General Relief recipients), the new partnership outlined in this document reflects an overarching agreement to focus on meeting the needs of the overall CalFresh population (60,000 individuals; 30,000 adults).

Given the eligibility requirements for CalFresh, it serves as a proxy for "low-income," and is thus central to the effort to impact poverty. Although priority-of-service already exists for recipients of public assistance and other low-income individuals, WDBVC and the Human Service Agency see this new relationship as an opportunity to ensure that the workforce development system contributes to a measurable reduction in poverty in the region.

Beginning in late 2018 and continuing through the submission of this document, the Ventura County Human Service Agency (VCHSA) and its CalFresh E&T partners have participated actively in the development of the two-year local plan update, working closely with WDBVC staff to identify ways to better serve the CalFresh population and low-income residents generally. While coordination efforts have grown in recent years, and a Memorandum of Understanding already exists between the Human Service Agency and the AJCC, this Local Plan Update represents an expansion of that collaboration and a strong commitment to meeting the needs of low-income Ventura County residents. The stakeholders appreciate CWDB making this a priority and supporting closer collaboration at the local level.

Following an initial meeting with VCHSA leadership in December 2018, the WDBVC invited community-based organizations, service providers, community colleges and county departments to an evening meeting in January to outline the process, review the current plans, and discuss the priorities for the two-year update. Over a dozen organizations and agencies attended that meeting. The WDBVC views each of these organizations as partners in the development of the update, and therefore in the workforce development system going forward.

A detailed assessment of Ventura County's CalFresh population and its needs related to workforce development is included as **Attachment B: CalFresh Partnership**. It shows that there are more than 30,000 adults receiving CalFresh benefits in the county, and that a significant portion of that total could benefit from greater access to workforce development services.

One noteworthy finding is that 43% of CalFresh households receive employment income yet still have incomes low enough to qualify for food assistance. Some work in very low-wage jobs, insufficient to lift their families out of poverty; others work part-time, whether by choice or not. In either case, working at low wages or not working at all, our strategies for successfully serving such individuals will need to include a range of "earn and learn" options. While some may be able to maintain their employment during training, many will not, particularly those working irregular shifts. Few jobs can accommodate intensive education or training schedules, yet few people can afford to go without income for the length of time it takes to complete a job training or education program.

WDBVC's Local Plan strongly supports the "earn and learn" approach of combining training and education with compensated applied learning opportunities. The success of such models depends on

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sustained employer engagement, and, often, the engagement of organized labor as well. The Board has identified eight apprenticeship programs in the region, and is working to expand that number.

More than 16% of the population of Ventura County is limited English proficient; most of those are Spanish-speakers. Among the CalFresh population, 26% of households are Spanish-speaking. Outreach to Spanish-speakers has long been a priority for WDBVC, and will continue to be a focus as we explore outreach strategies for CalFresh recipients. The Ventura County Adult Education Consortium, which includes the Community College District, the eight Adult Schools, and the Ventura County Office of Education, is already working with WDBVC to expand ESL services, including both literacy and numeracy classes as well as short-term training combined with contextualized literacy instruction.

Coordination of intake and assessment for core programs was identified in the four-year WIOA Local Plan as a system priority, with co-enrollment as a key strategy. The WDBVC and its partners are now looking at ways to efficiently align intake and enrollment practices beyond core programs, while still respecting the needs of each program and its requirements. The process of developing this Local Plan Update has highlighted several areas where small modifications in intake procedures could bring significant benefits for individual customers, and for the workforce development system as a whole.

This plan update process has highlighted the need for a modification in the intake protocol of the AJCC. While many AJCC customers are CalFresh recipients, AJCC staff have not historically entered CalFresh information into CalJobs. As a result, it is not possible to accurately gauge the current level of service to CalFresh recipients. Going forward, the AJCC will track CalFresh participation, and will assist customers who may be CalFresh-eligible but not enrolled in accessing that critical benefit.

WDBVC has an active Outreach Committee, which continuously enhances awareness of and access to workforce development services. New outreach strategies to reach the CalFresh population will be developed and implemented as needed. WDBVC will partner with CalFresh and the Human Services Agency to develop a marketing and outreach campaign specifically aimed at CalFresh recipients. In addition, building on the base established through our existing TANF/CalWORKS partnership, CalFresh will become a standing agenda item at the AJCC's bi-monthly Partners meeting. Through this venue, we will ensure collaboration at both the policy level and the day-to-day practice of front-line staff, sharing both diagnostic and performance data on an ongoing basis. Regular, structured communication between partners aimed at addressing concrete issues with collaborative problem-solving will be essential to making this new partnership work.

As the current four-year Local Plan states, services provided by program partners in support of program core competencies facilitate the braiding of resources to ensure access to a comprehensive menu of services tailored to individual needs. The WDBVC and local CalFresh officials are exploring options for braiding or blending funding to better serve low-income residents. CalFresh E&T funds can't be used to pay tuition, so one possibility would be for WIOA to cover an individual's tuition, while using CalFresh funds to offer generous (but necessary) support services.

Support services are critical to the success of low-income job-seekers. Under current policies, dependent on the availability of funding, program participants are eligible for transportation assistance, books and training supplies, tools required for employment, clothing, and vision/optical services, among other things. Need-related payments are allowed for WIOA-funded training only, and certain other limitations apply. Braided funding could allow some of those limitations to be lifted, allowing the flexibility to provide critical supports that can mean the difference between success and failure. Through their MOUs, the nineteen AJCC partners have agreed to integrate service delivery and braid resources to ensure access to a comprehensive menu of services tailored to each individual's needs.

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CalFresh and Child Support Services will now become part of this ongoing effort to collaborate for the benefit of our mutual clients.

The stakeholders are also discussing a procurement to select providers to pilot a SNAP 50% reimbursement program in Ventura County. This will involve identifying providers who are already offering eligible workforce services to CalFresh recipients using non-federal funding, and then assisting those providers in documenting that service and incorporating it into the local CalFresh plan, as well as the SNAP E&T Plan the state must submit to the USDA each August.

The County's goal is not to create a new 'siloe'd' program targeting CalFresh recipients, but instead to use all available resources to build a unified, comprehensive workforce system that serves all residents in need, including low-income food-assistance recipients. This means creating access for low-income residents to the sectors-based pathway programs established by the WDBVC in Manufacturing, Health Care, Clean/Green and Business Services. It also means providing them with the support services they will need to ensure their retention in those programs, and their progression into family-sustaining careers.

VCHSA has worked with community-based organizations for many years to serve at risk populations with barriers to employment by aligning training, education and supportive services. Current CBO partners include: Goodwill Inc., El Concilio, Food Share, Mixteco Indigenous Community Outreach Program (MICOP), United Way, Clinicas Del Camino Real, and Gold Coast Veteran's Foundation. Multiple opportunities are anticipated for additional CBOs to respond to RFPs for future services.

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Department of Child Support Services Partnership

As with CalFresh, the local Department of Child Support Services has played a major role in developing this Local Plan Update. DCSS has worked hard in recent years to transition from a punitive approach toward non-custodial parents to a more supportive one, and in doing so, had already begun to build bridges to the workforce development system and the AJCC. DCSS staff realize that most non-custodial parents will inevitably view them as enforcers of child support obligations, making them less-than-ideal messengers for workforce development services. At the same time, they understand that well-paid employment is the only real way for such parents to reach the point where they can in fact support their families. DCSS has therefore fully embraced the notion of a close working partnership with WDBVC, and contributed a number of the new ideas contained in this document.

DCSS participated in the January 31st evening meeting, as well as a series of planning discussions from December through March, and provided WDBVC with a wealth of data regarding non-custodial parents in Ventura County. The data shows that there are 17,621 non-custodial parents currently being tracked by DCSS. More than half identify as Hispanic; slightly under 15% are primarily Spanish-speaking. The exact overlap with the 30,000 adults receiving CalFresh is not yet known, but it is assumed by both CalFresh and DCSS to be significant.

There are a number of barriers presented by non-custodial parents, as discussed in **Attachment C: Department of Child Support Services Partnership**. These include the typical barriers found among low-income jobseekers in general, along with inevitable disincentives built into the child support system, including the fact that a significant share of any new income is likely to go to cover arrearages in child support. Successfully reaching this population requires acknowledging those issues and, where possible, crafting flexible approaches. Appendix C also identifies a number of services and supports that are necessary in order for non-custodial parents to be successful in meeting their parental obligations and in securing long-term, well-paid work.

In the past, DCSS caseworkers have provided individual non-custodial parents with written information about workforce services, as well as referrals to the AJCC for anyone interested. While this has proven helpful to some individuals, it has not happened in a systematic or comprehensive way, and has not resulted in large numbers of non-custodial parents seeking workforce services. The process of developing this Local Plan Update has clarified for us the need for a formal collaboration between WDBVC and DCSS.

Going forward, what is needed is a more wholistic collaboration which works closely with each individual, responds quickly to their needs or to changes in their situation, builds confidence and satisfaction with their work/life balance, and tracks them from initial enrollment to successful placement in a good job and beyond. An aggressive income maximization approach, along with ample opportunities for paid training, will necessarily be a key strategy for meeting the needs of non-custodial parents and their families. More generous transportation assistance could also make a difference for many individuals. For those with criminal records, a well-vetted felon-friendly employer, as discussed in our Two Year Regional Plan Update, list is essential.

Through this plan update process, the WDBVC, DCSS and related partners have agreed that they will meet regularly, and will share information on a monthly basis, regarding progress toward the goal of reaching all non-custodial parents with information about workforce services, as well as any issues that arise. WDBVC will partner with DCSS and the Human Services agency to develop and implement marketing and outreach strategies to reach this population. DCSS will participate in AJCC Partner meetings as well. Participants who have been placed in jobs will be tracked and supported for one year

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to ensure job retention, and provided with quick assistance in the event of job loss. The WDBVC and DCSS have agreed to pilot this collaboration for a target group of at least 50 non-custodial parents, with the DCSS caseworker and the AJCC counselor communicating directly with each other, the client, the service provider(s), and the employer on an ongoing basis. Maximizing the use of the temporary garnishment-reduction option, and/or reducing the amount owed in arrears, will be a critical incentivizing element of the strategy.

Creating a comprehensive system of services for noncustodial parents will require both a formal relationship between the WDBVC and DCSS and a close ongoing relationship at the front-line staff level. The issues presented by the population must become a cross-training topic for AJCC staff; CSS staff must become skilled at raising the issue of employment with clients and at effecting a warm referral to a career counselor at the appropriate point. Low-wage employment is insufficient to solve the non-custodial parent's financial dilemma. Both agencies must work together to ensure that noncustodial parents find their way into the kinds of jobs that can actually allow them to support themselves and their families.

There are currently no eligibility criteria for workforce services that would prevent the WDBVC or the AJCC from providing services to non-custodial parents, and no plans to enact such criteria. According to DCSS, a primary obstacle to participation for this population appears to be a desire among some noncustodial parents to avoid earning a reportable income. In this sense, motivation is a significant factor for at least some non-custodial parents. While some can be compelled, through job search orders, to participate in workforce services, a more successful strategy is likely to be educating participants about opportunities to find employment at wages high enough to actually allow them to support their families. Outreach strategies will therefore focus helping non-custodial parents understand the benefit of participating in workforce services that can lead to family-sustaining jobs.

Time and distance are two significant obstacles to the partnership envisioned here between the WDBVC and DCSS. Ventura County is 1,873 square miles, and comprises multiple urban areas as well as significant unincorporated and/or agricultural land. Offices are spread out between Ventura, Oxnard, and Camarillo. Bringing staff physically together on a regular basis is challenging. Even finding the time for everyone to participate in regular conference calls is difficult, pitting the time constraints of their 'day jobs' against the need for frequent conversations between partners. Minimizing these challenges does not make them go away; the solution will lie in creating efficient and effective structures. Some information, such as updates, can be handled by email or newsletter; conference calls, and especially in-person meetings, should not be devoted to updates, but to actual work tasks and decisions. Making the best use of everyone's valuable time will be essential.

Retention in programs is obviously critical to success in the labor market. This starts with a thorough and accurate assessment, to ensure that people are being placed in appropriate programs for which they are ready. Wrap-around case management and support services are necessary to ensure that minor issues don't develop into major crises. Active job placement, followed by strong post-placement support, will similarly serve to make sure that job placements stick, or (in the event they don't) that follow-up placement happens in a timely manner.

Existing partnerships, while somewhat limited and ad hoc, have enabled DCSS, the AJCC and the WDBVC to begin working together, and have formed the basis on which this new partnership is being built. What is new going forward is that there will be a formal agreement between those parties, both to try some immediate collaborations and to work together over time to expand those efforts. DCSS is exploring the possibility of placing a satellite team at the AJCC part-time; likewise, the AJCC will experiment with conducting outreach to non-custodial parents attending child-support hearings at the

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courtroom, as well as at the DCSS genetic testing room and lobby. DCSS has added a link to its website informing participants about the AJCC, and more such on-line connections are in the works. Additional stakeholders include Ventura County's three community colleges, the network of adult education providers, and a range of community-based organizations and social enterprises that touch this population. Possibilities to braid funding to better serve non-custodial parents are under discussion.

Historically, Goodwill has been the CBO with the strongest track record of serving the non-custodial population in Ventura County. Community based organizations play a key role in Ventura County's workforce development system, and are routinely made aware of opportunities to seek funding or participate in other ways in workforce efforts. It is anticipated that the new emphasis on reaching low-income residents, including non-custodial parents, will lead to new openings for CBOs to participate.

The stakeholders involved in developing this plan have reached agreement that they need to bring their intake and referral processes into alignment with each other in order to be effective. A shared mailbox, calendar, and MS Access database have been proposed, and are currently under review to ensure they meet privacy and related concerns. Joint staff-training webinars are also in development.

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Competitive Integrated Employment Updated Partnership

A very active partnership currently exists between the workforce system, the Department of Rehabilitation, and community-based providers on CIE. DOR has had a seat on the WDBVC for many years, as well as representation on multiple board committees, and is already a core partner in the AJCC, resulting in a great deal of attention being paid to job-seekers with intellectual, developmental, and other disabilities. WDBVC is committed not just to compliance with the Americans with Disabilities Act, but with making every effort to provide accommodation for the needs of everyone with a disability.

The Oxnard/Ventura and Thousand Oaks branches of DOR's Santa Barbara District, Tri-Counties Regional Center, the Ventura County Office of Education, local school districts, non-public schools, and more than 50 community partners, such as Goodwill, PathPoint, Jay Nolan Community Services and the ARC of Ventura County, work closely to meet the needs of people with disabilities. A new partnership is underway to bring the College of the Canyon's "Uniquely Abled" program to Camarillo.

The Workforce Development Board played a lead role in developing the Local Partnership Agreement, with the board's DOR representative serving as a principal author. AJCC and other workforce staff have been trained on topics such as: *What is DOR*; *Who does DOR serve*; and *Disability Etiquette*. The 'Windmills' program has been used to explore and improve attitudes towards people with disabilities. DOR staff are out-stationed 2 days a week at the AJCC. There is, however, room to expand staff training specific to ID/DD, and to repeat training for new staff as they come on.

There are multiple points of contact between DOR and the workforce system. At the highest level, the two supervisors of the Oxnard/Ventura branch of DOR share this responsibility, the supervisor of the Ventura unit serving on the Workforce Development Board and its subcommittees, and both supervisors representing DOR at various AJCC events and meetings. Other DOR staff participate as well, on youth teams and other working groups. Outreach to employers occurs through DOR and its vendors, such as Goodwill, PathPoint, and Jay Nolan, which offer supported employment services and intensive job coaching for individuals placed in jobs.

As noted, work is currently underway to bring the "Uniquely Abled" program, serving individuals on the autism spectrum, to Ventura County. Another projected enhancement involves job fairs for individuals with developmental disabilities, which currently happen twice a year at the Ventura County Office of Education; the new plan is to bring at least one of these on site at the AJCC. As noted above, there is also a need to take ID/DD training further, in the spirit of providing truly integrated services.

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Attachment A: Stakeholder Engagement and Community Outreach Efforts

The Workforce Development Board of Ventura County (WDBVC) applauds the California Workforce Development Board for establishing community outreach expectations that go beyond those of the Brown Act, and has worked hard to comply with both the letter and the spirit of those requirements in the development of this Two-Year Local Plan Update. To facilitate the plan update process and ensure that community input would exceed previous efforts, the WDBVC procured the services of a consulting firm, the Corporation for a Skilled Workforce, with specific expertise in community engagement. Following an initial meeting of key Ventura County Human Services Agency **CalFresh** and **Child Support Services** stakeholders in late 2018, the WDBVC held an evening meeting on January 31, 2019 at the AJCC in Oxnard which was publicized widely to all community members. The State Board was notified in advance of that meeting, and multiple email notices went out to several hundred individuals and organizations. Communications staff worked with the Ventura County Star (circulation 45,000) to ensure an article one week prior to the meeting.

Stakeholder meetings continued throughout the planning period. Mandatory stakeholders such as **VCHSA CalFresh**, **Child Support Services** and the **Department of Rehabilitation** became partners in the drafting of this plan, with weekly check-ins and follow-up conversations to ensure that all questions were given careful deliberation and answered in full. Stakeholders came to the table with many ideas about how the various parties could collaborate in the provision of services and work together going forward. The group worked to prioritize these and to incorporate the team's best thinking into this update. The WDBVC held a final public session at its regular board meeting on February 28th to review the draft plan update and finalize it for submission.

The **VCHSA CalFresh** team participated in the initial 2018 stakeholder meeting, and quickly responded to an initial request for data from the WDBVCVC. This led to ongoing engagement, as WDBVC reviewed the preliminary data and submitted a series of follow-up requests for clarification and additional information. With the exception of certain statistics that were not available due to the nature of their data system, VCHSA CalFresh was forthcoming with all of the information sought, and worked with WDBVC staff and the consultant to interpret the data and draw conclusions regarding the implications for the workforce development system. The VCHSA CalFresh team has expressed excitement at the prospect of working more closely with the WDBVC to ensure that all CalFresh recipients have access to the kinds of workforce development services that can begin to lift them out of poverty.

VCHSA CalFresh staff also participated in the January 31st evening meeting, offering an overview of the program and outlining their vision of a closer working partnership with the WDBVCVC and community partners. The VCHSA CalFresh representative at that meeting entertained a series of audience questions, and helped move the room toward an understanding and appreciation of the issues involved and the opportunities under consideration. VCHSA CalFresh staff reviewed drafts of the Local Update and offered editorial suggestions in the interest of nuance and accuracy.

A team of local **Child Support Services** staff also participated in the initial 2018 stakeholder meeting, and the Director was the first guest speaker at the January 31st evening meeting. Following a presentation by the WDBVC Director on the plan and update, the DCSS Director articulated a strong desire to connect with the workforce system in ways that benefit non-custodial parents and their families. Overlap

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between the CSS population and the CalFresh population became a major focus of the evening's discussion. Community members and providers spent the meeting brainstorming on ways to better meet the needs of Ventura County's low-income residents, and how to build stronger partnerships to make that happen.

The **Department of Rehabilitation** is already a mandated **partner** in the local workforce development system, with a seat on the WDBVC and representation on multiple committees. CIE service providers were represented at the January 31st evening meeting, as well as other planning meetings during the process of developing this update. As noted above, notice of the meeting, and the plan update process, was sent to several hundred individuals and organizations in Ventura County, including all providers of services to persons with intellectual or developmental disabilities. The organizations that participated in the development of the CIE LPA were among those organizations.

English Language Learners constitute a significant portion of the Ventura County population, and are a primary focus of both the WDBVC's four-year Local Plan and this two-year update. More than 41% of the county's population is Hispanic/Latino, and slightly over 16% report limited English language ability. The CalFresh population 26% Spanish-speaking. Among the organizations invited to participate in the plan update process were several organizations that serve the Latino community, as well as the eight adult education schools in the county, which have prioritized services to the limited-English population. In addition, many other service providers in the county reach this population, and were among those included in the initial email invitation for the January 31st evening meeting, and subsequent planning meetings. The WDBVC provides accommodations for disabilities and interpreting services for all public meetings as needed and requested by the public.

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Attachment B: CalFresh Partnership

As of January 2019, there were a total of 59,902 individuals receiving CalFresh food assistance in Ventura County, of which 29,376 were children and 30,526 were adults. Coincidentally, the number of adults corresponds very closely with the number of CalFresh households: 30,609. However, the population exhibits a wide diversity of household type, including everything from single-parent families with multiple children to households with multiple adults and no dependent children.

At more than 30,000 adults, this represents a substantial low-income target population for workforce development services. Even if we assume that many of those age 60+ are not looking for work, that still leaves well over 25,000 individuals. Not everyone will be interested in employment services at any given point in time, and some people are already being served, but the numbers suggest that there must be several thousand adults, at a minimum, who would benefit from a closer connection between CalFresh and the workforce system.

CalFresh is household-based, rather than family-based. Although many nuclear families are CalFresh recipients, CalFresh households are based on 'who purchases and prepares food together.' A household may comprise several unrelated individuals, such as roommates who eat together; many households include extended family members or multi-generational families. By the same token, homes with two or more adults do not necessarily represent two parents with children.

Current CalFresh demographics based on January/February 2019 data for Ventura County:

- *Total CalFresh Households: **30,609***
- *Total CalFresh Participants: **59,902 (30,526 adults + 29,376 children)***
- *Households with two or more adults: **4,048***
- *Households with one adult with children: **6,708***
- *Number of children age 0-4: **8,157 (28% of all children)***
- *Number of children age 5-9: **9,197 (31% of all children)***
- *Number of children age 10-14: **9,064 (31% of all children)***
- *Number of children age 15-17: **3,990 (14% of all children)***
- *Households with Able-Bodied Adults Without Dependents (ABAWD): **5,619***
- *Number of Able-Bodied Adults Without Dependents (ABAWD): **6,151 (20% of adults)***
- *Households with elderly individuals (60+): **5,737***
- *Number of elderly individuals (60+): **6,424 (21% of adults)***
- *Households with disabled individuals: **4,689***
- *Number of disabled individuals under the age of 60: **937***
- *Households with an ineligible non-citizen: **4,839***
- *Households with earned income: **13,270 (43% of households)***
- *Number of individuals with earned income: **10,329 (34% of adults)***
- *Households with disability-based income (SSA, Workers Comp, SDI etc.): **4,582***
- *English-speaking households: **22,272 (73% of total households)***
- *Spanish-speaking households: **8,040 (26% of total households)***
- *Number of Spanish-speaking individuals: **19,309 (32% of total individuals)***
- *Primary language other than English or Spanish: **297***

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Because there are no education eligibility requirements for the CalFresh program, no data is currently collected regarding CalFresh participant education levels. An unknown but significant portion of the 18+ population lacks a high school diploma, suggesting a need for adult education services that can prepare individuals for the HiSet test. With 26% of CalFresh households (32% of individuals) indicating Spanish as a primary language, the data suggests a significant language barrier for some portion of that population.

The current CalFresh E&T program is very small, and targets only the work-mandated General Relief subset of the ABAWD population. During the initial CalFresh/General Relief application process, a Client Benefit Specialist screens each applicant to determine if they meet a work registration exemption or if they are required to be work-registered with the E&T program. Work exemptions include, but are not limited to:

- Under age 16 or over 59;
- Attending school or training at least half-time;
- Physically or mentally unfit for employment;
- Pregnancy for women;
- Caring for an incapacitated person;
- Receiving or have applied for unemployment benefits;
- Participating in drug or alcohol treatment program;
- Employed or self-employed for a minimum of 30 hours per week

Employable CalFresh General Relief recipients who are registered to participate in the CalFresh E&T program are scheduled to attend an orientation which delivers program rules and expectations. Once the orientation has been completed, the participant is given an appointment with an Employment Services worker, who performs a comprehensive assessment to determine the appropriate E&T component and services needed. The assessment includes occupational interests, vocational skills and aptitudes, educational attainment levels, English proficiency, basic literacy skills, prior work experience, barriers to employment, and need for support services.

The CalFresh E&T program currently provides job search and job readiness services, other work-related skills training, and supportive services to approximately 30 people per year, with a budget of \$270,000. After the assessment described above, participants are assigned to work activities, and are assisted in accessing supportive services to assist in overcoming identified barriers to employment. CalFresh E&T participants are verbally referred to the AJCC for WIOA-funded job preparation/job search activities, workshops (resume writing, employment tips, managing money, interview skills, etc.), vocational training opportunities and job placement.

To meet CalFresh General Relief participants' needs, VCHSA offers transportation and vendor services. Transportation services are offered via bus passes (monthly pass) or bus tokens (daily pass). VCHSA has negotiated with local stores and schools to honor vendor claims for uniforms, tools, books, supplies, or testing fees. The ES worker addresses participants reimbursement on a case-by-case basis to ensure that they are reasonable, necessary, and directly related to participation in the E&T program. Current supportive services offerings are limited; the parties to this agreement are exploring ways to offer more generous supportive services where possible, which can mean the difference between success or failure for struggling participants.

The data suggests that significant numbers of CalFresh recipients are either unemployed or underemployed, and could benefit from job training or other workforce development services to obtain

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higher wages, particularly services that lead to employer-recognized certifications in in-demand occupations. WDBVC currently collaborates with the three colleges of the Ventura County Community College District, the Ventura County Adult Education Consortium, several area universities, labor unions and other education and training providers to advance career pathways programs that result in the attainment of industry-valued and recognized post-secondary credentials that are both portable and aligned with local and regional workforce needs.

The fact that 13,270 households have earned income yet still qualify for the CalFresh program (which has an income test tied to the federal poverty level) suggests a combination of:

- Individuals receiving income at or near minimum wage
- Individuals working less than 40 hours per week
- One wage earner supporting many individuals

Data does not indicate how many individuals correspond to each of these categories, but with 13,270 households, it is likely that there are at least a few thousand in each group. Low-wage workers need opportunities to earn a family-sustaining wage; part-time workers who wish to work full time need assistance in doing so; comprehensive income-maximization efforts must be implemented across the board.

Since many CalFresh recipients already work, in low-wage or part-time jobs, there is also a need for workforce development services that can accommodate their schedules: evening training, 'night school,' weekend hours, on-line training, etc. (Many are currently working in retail, where shifts can change from week to week and where employers who are willing to support training by allowing workers to maintain a steady shift are rare.)

The data suggests there are many working families, including one-parent families, that are likely to need help with childcare. Half of the total CalFresh population is under the age of 18. More than 8,000 children (28% of total children) are of pre-school age (0-4). Nearly 20,000 (67% of total children) are of school age (5-15) and thus potentially in need of after-school care. There are nearly 7,000 single-parent CalFresh households. Childcare is an ongoing barrier for a significant portion of the population: waiting lists are lengthy, and people are often left to seek childcare on their own, through formal or informal arrangements.

The data indicates that 21% of the adult CalFresh population is elderly (60+), a significant portion of whom may be outside the workforce, whether by choice or not. Approximately 15% of CalFresh households include someone with a disability; of those, some are working; others may be unemployed but interested in employment. More information is needed regarding the types of disabilities, the interest in employment, and the challenges faced in accessing jobs.

Equally important, particularly for those who do not currently have an income, is training that pays a wage of some kind, whether OJT or a training stipend. Earn and learn models are by definition more expensive than traditional training, which has implications regarding the numbers that can be served, but there is agreement among all stakeholders that we need to maximize such opportunities if we expect to reach low-income populations.

Financial empowerment and benefit maximization are strategies that the partners in this Local Plan Update intend to pursue in the interest of income mobility. The process of developing this document has helped us see that there are questions we should be asking of each enrollee in each of our respective programs. For example, intake at the AJCC should include a screening for any benefits an

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individual might be eligible for but not receiving. Low-income individuals who could be getting food assistance and are not should be advised on how to apply, and assisted with the application process.

The CalFresh application can be daunting for anyone not familiar with it, but in fact, for most applicants, the correct answer to many of the sometimes confusing questions is “Not Applicable.” The simple expedient of helping people apply for CalFresh would result in a significant increase of utilization – and since these are benefits to which people are entitled by virtue of income, there is no reason not to do so. The flip side of this coin, of course, is that everyone who applies for CalFresh should be provided with information about the workforce development services available at the AJCC, and encouraged to explore them.

Homelessness (along with near-homelessness) is a significant barrier for many CalFresh recipients. The emphasis on housing-first has at times had a deleterious impact on other strategies. However, even low-income housing requires an income, so strategies that combine housing and training are a real need.

CalFresh stakeholders and other partners identified a number of supportive services that might help CalFresh recipients be successful in workforce development programs and obtain family-sustaining employment:

- Low and/or no cost childcare for households with young children.
- More generous policies regarding items such as transportation, uniforms, books.
- Incentives (gift cards, training completion bonuses) have been effective in past.
- Perhaps funding could be braided here, with one funder covering training costs, while another covers some or all of the supportive services costs.
- Healthcare services for temporarily disabled individuals.

Not a “supportive service” per se, but some evidence suggests that CalFresh recipients might do better in a cohort model, where participants can effectively function as a support group, as opposed to seeking training on their own through the standard Individual Training Account model.

CalFresh intake staff do not have the time to explore employment and training options with each client, nor can they be expected to have the expertise to do so effectively. As a result of the development of this plan update, the WDBVC has agreed to review existing marketing materials and produce a very simple, targeted one-sheet document for CalFresh staff to use with new enrollees, pointing them quickly and efficiently to the AJCC and the workforce system. Referral protocols are being developed which will make this process more seamless, and less dependent on individual staff members expertise. At the same time, cross-training opportunities are being developed so that all CalFresh staff are aware of the workforce system, and AJCC staff understand CalFresh and the importance of income maximization.

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Attachment C: Child Support Services Partnership

Local Department of Child Support Services leadership approached the WDBVC early in the plan update process and expressed a desire to play an active role. CSS has worked hard to move from a purely punitive approach to a model which supports noncustodial parents, including helping connect them to employment-related services. Recognizing that there are limitations on what CSS staff can do in this regard, the agency has worked to build bridges with the AJCC and the workforce system, and is ready to take this collaboration to a new level. CSS participated in the meetings with CalFresh described above, as well as in the January evening meeting, and together with the WDBVC is working with community colleges, community-based organizations and other local service providers to identify ways to better serve the CSS population.

As of January 2019, there were 17,621 non-custodial parents tracked by CSS in Ventura County. English-speakers accounted for 13,324 (76%), with Spanish-speakers the second-largest population, at 2,467 (14%). More than more than half, however (51%) identify as Hispanic. A total of 1,232 (7%) identify as Black or African. Various Asian populations account for 363 individuals (2%), with Filipinos constituting the single largest group. While the population is overwhelmingly (89%) male, there are 1,782 female non-custodial parents. Well over half of the population (59%) is between the ages of 21 and 45. The single area of highest concentration is Oxnard, where 21% of participants reside.

In the development of this plan update, Child Support Services, the WDBVC and partner agencies have identified the following types of services as being of particular need in order to help certain non-custodial parents meet their parental responsibilities: access to legal services and family law facilitators; parenting classes; assistance to improve credit scores and prioritize finances; housing; health insurance; expungement of criminal records. More specifically, if they are to be successful in the labor market, many non-custodial parents require adult education services, job training services, job placement and follow-up services, and the kinds of support services that can help people succeed in all of these, starting with transportation assistance.

At present, these services are not provided or available on a consistent, comprehensive manner. Individual staff work with individual clients to make the connection to the AJCC and workforce services, but it does not happen in a systematic or universal way. Developing this plan update together has allowed CSS and the WDBVC to focus on the need for a more formal collaboration, to ensure that all non-custodial parents have access to workforce development services. Toward that end, staff from each agency will spend time offering services at the other's location, and will be trained in the services and opportunities each agency has to offer.

Barriers faced by significant numbers of non-custodial parents include lack of skills, gaps in work history, disabilities which make finding or holding employment difficult, criminal records, large debts, immigration status, license suspension, substance abuse or other mental health issues, homelessness and language barriers. For some non-custodial parents, these are augmented by a lack of motivation to earn reportable income due to wage garnishment.

Efforts are currently made to address these barriers, but they are not adequate to meet the need. CSS provides participants with a detailed resource list, job postings, and referrals to the AJCC, the Family Law Facilitator, and legal services, among others. Non-custodial parents have access to bus passes, Rideshare, and Uber/Lyft coupons.

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In certain cases, the amount the participant owes can be temporarily reduced once the individual enrolls in on-the-job training or is placed in approved employment. This obviously has an impact on the custodial parent and the children, so it is a tool that must be used judiciously, but it could be the key to helping non-custodial parents get started on the road to fulfilling their parental responsibilities.

DRAFT



Workforce Development Board of Ventura County

WIOA QUARTERLY REPORT (CalJOBS Predictive)

Program Year 2018 – 2019: Second Quarter (Q2)

WIOA PERFORMANCE INDICATORS

DISCLAIMER: The WIOA performance indicators reported herein will serve to provide a quarterly “snapshot” of program performance. Quarterly reports are generated through CalJOBS (Detailed Reports/Case Management Reports/Predictive tab). The Success Rate shows a numerical gage of success in meeting the negotiated goal established by the WDB and EDD.

(Q2) Quarterly Report (CalJOBS Predictive)

YOUTH CONTRACTED SERVICE PROVIDERS

	Employment or Education Placement Rate 2nd Quarter After Exit (Cohort Period: 10/1/2017 – 12/31/2017)					Employment or Education Placement Rate 4th Quarter After Exit (Cohort Period: 04/01/2017- 06/30/2017)					Credential Attainment within 4 Quarters After Exit (Cohort Period: 04/01/2017 – 06/30/2017)				
	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients
BGCOP	65.4%	60%	75%	92%	3/5	62.0%	81%	81%	131%	54/67	53.0%	87%	89%	164%	20/23
PPT	65.4%	50%	83%	76%	3/6	62.0%	78%	77%	113%	31/40	53.0%	53%	42%	100%	8/15

	Median Earnings 2nd Quarter After Exit (Cohort Period: 10/1/2017 – 12/31/2017)					Measurable Skills Gain (Cohort Period: 10/1/2018 -12/31/2018)				
	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients
BGCOP	\$3,491	\$5,154	\$4,305	148%	3	42.70%*	26%	62%	61%	5/19
PPT	\$3,491	\$7,500	\$3,392	215%	3	42.70%*	16%	41%	37%	8/49

LEGEND

PPT: PathPoint

BGC: Boys & Girls Clubs of Oxnard and Port Hueneme

Goal: LWIA Final Performance Levels for PY 2018-2019

Success Rate: Actual performance divided by goal.

Clients: Numerator = only clients with a *positive* outcome.

Denominator = *All* clients included in the outcome

NA: Not Available

*(Proposed baseline/ Not yet Accountable)

Rolling 4 Quarters Cohort Period (view of longer term performance)

1. Employment, Education or Training Placement Rate (Q2) (Cohort Period: 01/01/2017 – 12/31/2017)
2. Employment, Education or Training Placement Rate (Q4) (Cohort Period: 10/1/2016 – 09/30/2017)
3. Median Earnings (Cohort Period: 01/01/2017 – 12/31/2017)
4. Credential Rate (Cohort Period: 10/1/2016 – 09/30/2017)
5. Measurable Skill Gains (Cohort Period: 01/01/2018 – 12/31/2018)

ENROLLMENTS: BGCOP

Participation Summary	Enrollment Goal	YTD Total	YTD Exited
Participants Carried In (PY17-18)	-	29	17
New Participants (PY18-19)	92	<u>79</u>	<u>0</u>
Total Participants	-	108	17

ENROLLMENTS: PPT

Participation Summary	Enrollment Goal	YTD Total	YTD Exited
Participants Carried In(Py17-18)	-	26	11
New Participants (PY18-19)	80	<u>78</u>	<u>02</u>
Total Participants	-	104	13

(Q2) Quarterly Report (CalJOBS Predictive)
HUMAN SERVICES AGENCY/ ADULT & FAMILY SERVICES/ WIOA CAREER SERVICES

	Employment Placement Rate 2nd Quarter After Exit (Cohort Period: 10/1/2017 – 12/31/2017)					Employment Placement Rate 4th Quarter After Exit (Cohort Period: 04/01/2017- 06/30/2017)					Credential Attainment within 4 Quarters After Exit (Cohort Period: 04/01/2017 – 06/30/2017)				
	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients
Adult	64.0%	88%	89%	138%	15/17	60.5%	96%	83%	159%	24/25	53.0%	100%	91%	189%	8/8
DW	68.0%	77%	82%	113%	23/30	63.5%	81%	81%	128%	21/26	57.0%	68%	78%	119%	13/19

	Median Earnings 2nd Quarter After Exit (Cohort Period: 10/1/2017 – 12/31/2017)					Measurable Skills Gain (Cohort Period: 10/1/2018 -12/31/2018)				
	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients	Goal	Qtr. Actual	Rolling 4 Quarters	Qtr. Success Rate	Clients
Adult	\$5,200	\$7,947	\$6,998	153%	16	51.0%*	58.3%	72%	114%	60
DW	\$7,450	\$9,708	\$9,943	130%	23	45.7%*	50.8%	67%	111%	61

Rolling 4 Quarters Cohort Period (view of longer term performance)

1. Employment Placement Rate (Q2) (Cohort Period: 01/01/2017 – 12/31/2017)
2. Employment Placement Rate (Q4) (Cohort Period: 10/1/2016 – 09/30/2017)
3. Median Earnings (Cohort Period: 01/01/2017 – 12/31/2017)
4. Credential Rate (Cohort Period: 10/1/2016 – 09/30/2017)
5. Measurable Skill Gains (Cohort Period: 01/01/2018 – 12/31/2018)

*(Proposed baseline/ Not yet Accountable)

ENROLLMENTS: Adult

Participation Summary	Enrollment Goal	YTD Total	YTD Exited
Participants Carried In(Py17-18)	-	49	29
New Participants (PY18-19)	99	<u>88</u>	<u>05</u>
Total Participants	-	137	34

ENROLLMENTS: Dislocated Worker

Participation Summary	Enrollment Goal	YTD Total	YTD Exited
Participants Carried In(Py17-18)	-	80	42
New Participants (PY18-19)	107	<u>62</u>	<u>02</u>
Total Participants	-	142	44