



# **WORKFORCE DEVELOPMENT BOARD MEETING AGENDA PACKET**

Thursday, June 26, 2025  
9:00 a.m. - 11:00 a.m.

344 Salinas Street, Suites 205 & 206  
Salinas, CA 93901

Documents related to agenda items that are distributed to the WDB less than 72 hours prior to the meeting shall be available for public inspection at 344 Salinas Street, Suite 101, Salinas, CA or visit our website at [www.montereycountywdb.org](http://www.montereycountywdb.org). Documents distributed to the WDB at the meeting by County staff will be available at the meeting; documents distributed to the WDB by members of the public shall be made available after the meeting. This WIOA Title I financially assisted program or activity is an equal opportunity employer/program and auxiliary aids and services are available upon request to individuals with disabilities.

ALTERNATE AGENDA FORMATS: If requested, the agenda shall be made available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 USC Sec. 12132), and the federal rules and regulations adopted in implementation thereof. Individuals with a disability requiring a modification or accommodation, including auxiliary aids or services, in order to participate in the public meeting may make these requests to the WDB staff at (831) 796-6434. TTY/CRS: Dial 711.

## NOTICE TO THE PUBLIC

Members of the public who wish to address the Board should identify themselves and state their name for the record. You should complete a blue Comment Card located near the door, prior to making comments, and hand it to the designated Workforce Development Board staff member.

Copies of the agenda have been placed on the table near the door for your convenience.

The procedure for this meeting is as follows:

- The Board staff will verify quorum; the Chair will read the opening remarks.
- Members of the public wishing to make a comment on an item that is not on the agenda will be given two (2) minutes each to comment.
- Workforce Development Board staff and/or Board Members will present recommendations for each action item on the agenda.
- Board members may ask questions of Workforce Development Board staff and other Board Members.
- Members of the public wishing to make a comment on an agenda item will be given two (2) minutes each to comment.
- The Board may take action on any item designated as an action item.
- Workforce Development Board members may only discuss items listed on the Agenda pursuant to the "Brown Act." With respect to non-agenda items raised by the public, Workforce Development Board members may calendar them for a future meeting, may briefly respond, or may request clarification from the member of the public but, to remain in compliance with the Brown Act, they may not address non-agenda items raised by the public in a substantive or in-depth manner.



344 Salinas Street, Suite 101  
Salinas, CA 93901

(831) 796-3331  
[www.montereycountywdb.org](http://www.montereycountywdb.org)

**WDB Members:**

*Erik Cushman,*  
WDB & Executive Chair

*Cesar Lara,*  
WDB 2<sup>nd</sup> Vice Chair

Alma Diaz  
Arpi Tanilian  
Casey Van Den Heuvel  
Efrain Aguilera  
Josh Metz  
Justin McIntire  
Kimberly Schnader  
Mark Faylor  
Michael Gutierrez  
Paula Calvetti  
Roger Gilbert  
Salvador Munoz  
Supervisor Luis Alejo

**Monterey County**  
**Workforce Development Board Meeting**  
**Thursday, June 26, 2025**  
**344 Salinas Street, Suites 205 & 206, Salinas, CA 93901**

**AGENDA**

<b>CALL TO ORDER/ROLL CALL:</b>	Erik Cushman, Chair
<b>CHANGES TO AGENDA:</b>	
<b>PUBLIC COMMENT:</b> <i>(Limited to 2 minutes per person)</i>	
<b>CONSENT CALENDAR:</b>	Erik Cushman
1. <b>ACTION:</b> Consider approval of minutes from the Special Monterey County Workforce Development Board (MCWDB) meeting of April 8, 2025.	Erik Cushman
2. <b>ACTION:</b> Concur with the Executive Committee's May 15, 2025, recommendation to approve the appointment of Arpi Tanilian, representing Business, to the MCWDB.	Erik Cushman
3. <b>ACTION:</b> Concur with the Executive Committee's May 15, 2025, recommendation to approve the appointment Justin McIntire, representing the State of California's Department of Rehabilitation (DOR), to the MCWDB.	Erik Cushman
4. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to reappoint Paula Calvetti, representing Business, to the MCWDB.	Erik Cushman
5. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to reappoint Salvador Munoz, representing Business, to the MCWDB.	Erik Cushman
6. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to reappoint Michael Gutierrez, representing Education, to the MCWDB.	Erik Cushman
7. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to reappoint Cesar Lara, representing Labor, to the MCWDB.	Erik Cushman
8. <b>ACTION:</b> Concur with the Executive Committee's May 15, 2025, recommendation to consider and approve the following Workforce Innovation and Opportunity Act (WIOA) policies: <ul style="list-style-type: none"> <li>• #2025-06: On-the-Job Training (OJT) Policy and Procedures</li> <li>• #2025-07: Auditing and Audit Resolution Policy</li> </ul>	Erik Cushman
9. <b>ACTION:</b> Concur with the Executive Committee's May 15, 2025, recommendation to ratify its approval to submit a request to the State of California's Employment Development Department (EDD) to transfer \$963,000 of WIOA Dislocated Worker program funding to the WIOA Adult program.	Erik Cushman
10. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to approve the submittal of the 2025-28 WIOA One-Stop Partner Memorandum of Understanding (MOU) to the Board of Supervisors and EDD.	Erik Cushman
11. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to approve funding from the California Volunteers, Office of the Governor, Youth Service Corps, in the amount of \$1,998,840 to fund the MCWDB's Green Cadre Youth program to serve 90 young adults for an 18-month period.	Erik Cushman
12. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to approve extending the agreement with Arbor E&T, dba Equus Workforce Solutions, to provide One-Stop Operator Services in the amount of \$334,532 for Program Year (PY) 2025-26.	Erik Cushman



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**WDB Members:**

*Erik Cushman,*  
WDB & Executive Chair

*Cesar Lara,*  
WDB 2<sup>nd</sup> Vice Chair

Alma Diaz  
Arpi Tanilian  
Casey Van Den Heuvel  
Efrain Aguilera  
Josh Metz  
Justin McIntire  
Kimberly Schnader  
Mark Faylor  
Michael Gutierrez  
Paula Calvetti  
Roger Gilbert  
Salvador Munoz  
Supervisor Luis Alejo

13. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to approve extending the agreement with Arbor E&T, dba Equus Workforce Solutions, to provide WIOA Title 1 Adult and Dislocated Worker case management services in the amount of \$1,300,000 for PY 2025-26.		Erik Cushman
14. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to approve extending the agreement with Arbor E&T, dba Equus Workforce Solutions, to provide WIOA Title 1 Youth case management services in North Monterey County in the amount of \$650,000 for PY 2025-26.		Erik Cushman
15. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to approve extending the agreement with Turning Point of Central California to provide WIOA Title 1 Youth case management services in South Monterey County in the amount of \$700,000 for PY 2025-26.		Erik Cushman
16. <b>ACTION:</b> Concur with the Executive Committee's June 12, 2025, recommendation to approve extending the agreement with Pat Davis Design Group to provide communications materials in the amount of \$45,000 for PY 2025-26.		Erik Cushman
<b>BUSINESS CALENDAR:</b>		Erik Cushman
1. <b>ACTION:</b> Consider approval of the proposed, preliminary 2025-26 MCWDB Budget.		Daisy Fernandez
2. Update on MCWDB's FY 2024-25 budget and expenditures through May 31, 2025.		Daisy Fernandez
3. Update on the Pajaro Business Relief Program.		Vanessa Kor
4. Update on 2023-24 EDD monitoring and 2024-25 MCWDB subrecipient monitoring.		Chris Donnelly
5. Update on WIOA Adult, Dislocated Worker, and Youth programs.		Lucy Iracheta Lourdes Luviano Michael Artalejo
6. Discussion on recruitment of new MCWDB members representing Business.		Erik Cushman
7. Update on Board members' workforce and business activities.		Individual Board Members
<b>ANNOUNCEMENTS:</b>		Erik Cushman
<b>SUBCOMMITTEE MEETINGS:</b> Executive: 7/17/25	<b>WDB MEETING:</b> August 28, 2025	
<b>ADJOURNMENT</b>		Erik Cushman
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**UNADOPTED MINUTES**

**Special Monterey County Workforce Development Board Meeting**

America's Job Center of California, 344 Salinas Street, Suites 205 & 206, Salinas, CA 93901

**Tuesday, April 8, 2025**

**Members Present:** Erik Cushman (Chair), Cesar Lara, Casey Van Den Heuvel, Efrain Aguilera, Josh Metz, Mark Faylor, and Supervisor Luis Alejo

**Members Absent:** Denise Dorsey, Michael Gutierrez, Paula Calvetti, Roger Gilbert

**Staff Present:** Pearl Sanchez, Elizabeth Kaylor, Daisy Fernandez, and Linda Avakian

**Public Comment:** None

**Call to Order/Introductions:** Erik Cushman called the meeting to order at 9:16 a.m. and asked for introductions. A quorum was established.

**Changes to Agenda:** None

**Consent Calendar:**

1. **ACTION:** Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) meeting of January 23, 2025.
2. **ACTION:** Concur with the Executive Committee's March 20, 2025, recommendation to approve the appointment of Alma Diaz, State of California Employment Development Department (EDD).
3. **ACTION:** Concur with the Executive Committee's March 20, 2025, recommendation to approve the reappointment of Mark Faylor, Peninsula Business Interiors, representing Business, to the WCWDB.
4. **ACTION:** Concur with the Executive Committee's March 20, 2025 recommendation to approve the appointment of Salvador Munoz, S. Munoz and Associates Architects, representing Business, to the MCWDB.
5. **ACTION:** Ratify the Executive Committee's March 20, 2025, recommendation to approve the submittal of the WIOA Application for Local Area Subsequent Designation and Local Board Recertification for Program Years (PY) 2025-27.

**A motion was made by Casey Van Den Heuvel to approve all items on the Consent Calendar, seconded by Josh Metz. ALL AYES. Motion passed.**

**Discussion or Review of Business Calendar Action Items:**

1. **PRESENTATION:** Staff will provide a demonstration of Transfr Virtual Reality (VR) goggles for VR career exploration. The presentation was cancelled due to lack of time.
2. **ACTION:** Approve the submittal of the WIOA Local and Regional Plans for 2025-28.  
**A motion was made by Cesar Lara to approve the submittal of the Local and Regional Plans, seconded by Mark Faylor. ALL AYES. Motion passed.**
3. Finance Manager Daisy Fernandez gave an update on MCWDB's 3<sup>rd</sup> Quarter expenditures.
4. Executive Director Chris Donnelly gave an update on Pajaro Business Relief Program.
5. Operations Manager Pearl Sanchez discussed recent requests for corrective actions issued to Equus Workforce Solutions and Turning Point of Central California relating to their 2024-25 performance.
6. Pearl Sanchez discussed EDD's upcoming 2023-24 Local Area program, fiscal and procurement monitoring, and internal program and fiscal monitoring of Equus and Turning Point for 2024-25.
7. One Stop Operator Elizabeth Alvarez gave an update on the MCWDB's One-Stop Operator program.
8. A program update was provided by WIOA funding subrecipient representatives of the Adult, Dislocated Worker, and Youth Programs.
9. Board members provided updates on workforce and business activities.

**Adjournment:** Mr. Erik Cushman adjourned the meeting at 11:06 a.m.



WORKFORCE DEVELOPMENT  
BOARD: 6/26/2025  
CONSENT AGENDA ITEM: 2

# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval of Appointment of Arpi Tanilian,  
Representing Business

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concur with the Executive Committee's June 12, 2025, recommendation to approve the appointment of Arpi Tanilian, representing Business, to the Monterey County Workforce Development Board.

**BACKGROUND:**

Ms. Tanilian, Senior Analyst, Human Resources, Mann Packing Company, Inc., has applied for membership to the full Workforce Development Board. Ms. Tanilian will be filling an unexpired Business representative's term to expire on March 7, 2026.

**ATTACHMENTS:**

Ms. Arpi Tanilian's application





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## Monterey County Workforce Development Board (WDB) Membership Application

Name: Arpi Tanilian Date Submitted: 04/18/2025  
Title: HR Sr. Analyst  
Business/Organization Name: Mann Packing Company Inc

### Representation

Please select from one of the following categories that you represent: (*Federal Register Section 679.320*)

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Business  | <input type="checkbox"/> Local Educational Entity                    |
| <input type="checkbox"/> Labor Organization   | <input type="checkbox"/> Community-Based Organization                |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Wagner-Peyser                               |
| <input type="checkbox"/> Rehabilitation       | <input type="checkbox"/> Chief Elected Official/Board of Supervisors |

### Contact Information

Business/Organization Name: Mann Packing Company Inc  
City: Gonzales State: California Zip code: 93926  
Phone: 559-425-0000 ext 40112 Fax: N/A  
Mobile: 559-425-0000  
Email address: atanilian@freshdelmonte.com  
Website address: www.VeggiesMadeEasy.com, www.freshdelmonte.com  
Business license number: 12345  
City of residence: Salinas, California

### Business Related Questions

Please answer the following questions and attach any additional pages, if necessary:

1. Number of current employees: around 500
2. Number of years with current business/organization: almost 3 years
3. Number of years in business in Monterey County: Since 1939
4. Please describe the nature of your business and your position: Please refer to attached document

5. Please list your current chamber and association memberships, the duration of each membership and the positions you currently hold:  
Leafy Greens Marketing Agreement for California/Arizona
6. Please list any professional award(s) or recognition you have received within the last 5 years:  
N/A
7. As a member of your business with optimum policy authority, please describe your responsibilities within your organization:  
Please refer to attached document

### *Monterey County WDB Related Questions*

Please answer the following questions and attach any additional pages, if necessary:

1. What do you hope to contribute from your participation on the Monterey County WDB  
Please refer to attached document
2. What experience in the areas of fundraising, budget analysis, workforce policy development, youth services, knowledge of the labor market, and community involvement or linkages with educational agencies do you bring to the Monterey County WDB, as applicable?  
Please refer to attached document
3. Membership on the Monterey County WDB requires that each member attend a full WDB meeting every two months, attend training sessions for board members and become an advocate for workforce development. The time commitment for these activities ranges from a minimum of 4 to 10 hours per month. Can you make that time commitment? Yes ☒ No ☐
4. Membership on the Monterey County WDB requires that each member serves on a sub-committee. The time commitment for this activity ranges from a minimum of 3 to 4 hours per month. Can you make that time commitment? Yes ☒ No ☐
5. Why do you wish to serve on the Monterey County WDB? (Describe in 100 words or less)  
Please refer to attached document

### *Signature and Acknowledgement*

I, the undersigned, certify that the information on this application is true and correct to the best of my knowledge and that, if appointed to serve, I will do so to the best of my ability and in the best interest of Monterey County and its citizens.

Signature: \_\_\_\_\_

Date: 04/18/2025



**Business Related Questions:**

4. Mann Packing Co Inc is a leading supplier of premium fresh vegetables including commodity produce, fresh cut veggie mixes, on the go meals, and salads. I am the HR Sr. Analyst at the company.

7. As a Senior Human Resources Analyst at Mann Packing Co., my role would encompass a blend of strategic analysis, operational support, and policy implementation within the HR department. Ensure HR policies comply with collective bargaining agreements (CBAs) and are implemented consistently across union – represented employees.

**Monterey County WBD Related Questions:**

1. I hope to contribute a thoughtful, forward-thinking perspective that supports equitable economic growth and workforce opportunities for all community members. Also help foster partnerships, support innovation in workforce training, and promote career pathways that lead to long term success for both job seekers and employers in our region.
2. Throughout my experience in the education system in different countries, I have been involved in developing youth employment and mentorship programs. I have collaborated with schools and employers to offer job readiness trainings, internships, and soft-skills development. I have taken part in many fundraising events. I have contributed to many workforce development strategies by evaluating needs and working towards implementing those skills.

5. I wish to serve on the Monterey County Workforce Development Board because I'm deeply committed to supporting workforce solutions that empower both employers and job seekers in our region. With my background in human resources analytics, especially in a unionized environment like Mann Packing, I bring a nuanced understanding of workforce dynamics, labor relations, and talent development.

I believe that through strategic partnerships, smart policy, and targeted training initiatives, we can address the skills gap, support economic mobility, and help local businesses thrive. I'm passionate about ensuring all workers have access to the resources they need to build meaningful, sustainable careers.

Serving on the WDB is an opportunity for me to give back to the community, bring a practical, employer-informed perspective to the table, and help shape a resilient, future-ready workforce in Monterey County.



WORKFORCE DEVELOPMENT  
BOARD: 6/26/2025  
CONSENT AGENDA ITEM: 3

## MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval of Appointment of Justin McIntire,  
Representing the Department of Rehabilitation

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concur with the Executive Committee's June 12, 2025, recommendation to approve the appointment of Justin McIntire, representing the State of California's Department of Rehabilitation (DOR), to the Monterey County Workforce Development Board.

**BACKGROUND:**

Mr. McIntire, District Administrator for the DOR, has applied for membership to the full Workforce Development Board. Mr. McIntire will be filling an unexpired DOR representative's term to expire on March 7, 2026.

**ATTACHMENTS:**

Mr. McIntire's application



344 Salinas Street, Suite 101 | Salinas, CA 93901

## Monterey County Workforce Development Board (WDB) Membership Application

Name: Justin McIntire Date Submitted: 4/18/2025  
Title: District Administrator  
Business/Organization Name: Department of Rehabilitation

### Representation

Please select from one of the following categories that you represent: (*Federal Register Section 679.320*)

- |  |  |
|--|--|
| <input type="checkbox"/> Business                  | <input type="checkbox"/> Local Educational Entity                    |
| <input type="checkbox"/> Labor Organization        | <input type="checkbox"/> Community-Based Organization                |
| <input type="checkbox"/> Economic Development      | <input type="checkbox"/> Wagner-Peyser                               |
| <input checked="" type="checkbox"/> Rehabilitation | <input type="checkbox"/> Chief Elected Official/Board of Supervisors |

### Contact Information

Business/Organization Name: Department of Rehabilitation  
City: Salinas State: California Zip code: 93901  
Phone: (805) 560.8162 Fax: 805.560.8162  
Mobile: \_\_\_\_\_  
Email address: justin.mcintire@dor.ca.gov  
Website address: https://www.dor.ca.gov/  
Business license number: \_\_\_\_\_  
City of residence: San Luis Obispo

### Business Related Questions

Please answer the following questions and attach any additional pages, if necessary:

1. Number of current employees: 17
2. Number of years with current business/organization: 13
3. Number of years in business in Monterey County: \_\_\_\_\_
4. Please describe the nature of your business and your position: Employment Agency Providing Services to People with Disabilities

5. Please list your current chamber and association memberships, the duration of each membership and the positions you currently hold:  
N/A
6. Please list any professional award(s) or recognition you have received within the last 5 years:  
N/A
7. As a member of your business with optimum policy authority, please describe your responsibilities within your organization:  
Oversee operations for 7 offices throughout 4 counties ensuring job seekers obtain the services they need to obtain, maintain, and advance in their employment.

### *Monterey County WDB Related Questions*

**Please answer the following questions and attach any additional pages, if necessary:**

1. What do you hope to contribute from your participation on the Monterey County WDB  
Work in collaboration to advance the mission of the Monterey County WDB and while ensure people with disabilities are included.
2. What experience in the areas of fundraising, budget analysis, workforce policy development, youth services, knowledge of the labor market, and community involvement or linkages with educational agencies do you bring to the Monterey County WDB, as applicable?  
I have experience in operations of the workforce system, collaborating with community partners, partnering with educational systems, and linking those organizations to business.
3. Membership on the Monterey County WDB requires that each member attend a full WDB meeting every two months, attend training sessions for board members and become an advocate for workforce development. The time commitment for these activities ranges from a minimum of 4 to 10 hours per month. Can you make that time commitment? Yes ☒ No ☐
4. Membership on the Monterey County WDB requires that each member serves on a sub-committee. The time commitment for this activity ranges from a minimum of 3 to 4 hours per month. Can you make that time commitment? Yes ☒ No ☐
5. Why do you wish to serve on the Monterey County WDB? (Describe in 100 words or less)  
My goal is to serve job seekers and the business community to meet the needs of both entities while ensuring people with disabilities are fully included into the workplace.

### *Signature and Acknowledgement*

I, the undersigned, certify that the information on this application is true and correct to the best of my knowledge and that, if appointed to serve, I will do so to the best of my ability and in the best interest of Monterey County and its citizens.

Signature: [Signature]

Date: 4/18/2025



# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval of Reappointment of Paula Calvetti,  
Representing Business

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board approves the Executive Committee's June 12, 2025, recommendation to reappoint Paula Calvetti, representing Business, to the Monterey County Workforce Development Board.

**BACKGROUND:**

Ms. Calvetti, Director of Human Resources, Hyatt Regency Monterey, has reapplied for membership to the full Workforce Development Board.

The WDB bylaws state that the term of membership for all WDB members shall be three years. The three-year term limit was enacted with the approval of the original WDB bylaws by the Board of Supervisors on June 23, 2015.

**ATTACHMENTS:**

Ms. Paula Calvetti's application



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## Monterey County Workforce Development Board (WDB) Membership Application

Name: Paula Calvetti Date Submitted: 4/30/2025  
Title: Director of Human Resources  
Business/Organization Name: Hyatt Regency Monterey

### Representation

Please select from one of the following categories that you represent: (*Federal Register Section 679.320*)

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Business  | <input type="checkbox"/> Local Educational Entity                    |
| <input type="checkbox"/> Labor Organization   | <input type="checkbox"/> Community-Based Organization                |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Wagner-Peyser                               |
| <input type="checkbox"/> Rehabilitation       | <input type="checkbox"/> Chief Elected Official/Board of Supervisors |

### Contact Information

Business/Organization Name: Hyatt Regency Monterey  
City: Monterey State: CA Zip code: 93940  
Phone: 831-657-6539 Fax: 831-657-6539  
Mobile: [REDACTED]  
Email address: paula.calvetti@hyatt.com  
Website address: hyattregencymonterey.com  
Business license number: [REDACTED]  
City of residence: [REDACTED]

### Business Related Questions

Please answer the following questions and attach any additional pages, if necessary:

1. Number of current employees: 300
2. Number of years with current business/organization: 37 years
3. Number of years in business in Monterey County: 50+
4. Please describe the nature of your business and your position: Hospitality - Dir of Human Resources

5. Please list your current chamber and association memberships, the duration of each membership and the positions you currently hold:

All on going: Monterey & Carmel Chamber of Commerce, Monterey County Convention Visitors Bureau; Monterey County Hospitality Association; Chairperson Monterey Culinary Pension Fund (Employer Trustee)

6. Please list any professional award(s) or recognition you have received within the last 5 years:

Volunteer of the Year - Monterey County Hospitality Association< Nominee for HR Department of the Year 2025

7. As a member of your business with optimum policy authority, please describe your responsibilities within your organization:

All Human Resource functions for Hyatt Regency Monterey to include recruitment, hiring, training, compensation, diversity and Inclusion initiatives performance management, benefits administration, payroll, coaching and counseling, conflict resolution Retention, labor relations and team member recognition.

## *Monterey County WDB Related Questions*

**Please answer the following questions and attach any additional pages, if necessary:**

1. What do you hope to contribute from your participation on the Monterey County WDB

I hope to contribute insight into the hospitality industry and collaborate with other business professionals to meet the labor needs and future development of Monterey County's workforce.

2. What experience in the areas of fundraising, budget analysis, workforce policy development, youth services, knowledge of the labor market, and community involvement or linkages with educational agencies do you bring to the Monterey County WDB, as applicable?

I have held multiple PTSA and PTO Officer positions at Monterey High School and San Carlos School - currently PTO Treasurer.

I have served as committee chairperson and participant for numerous fundraisers. I have years of experience recruiting for the hospitality industry. Over the years Hyatt has partnered with Rancho Cielo for job shadowing and temporary job placement. In addition Hyatt has cultivated relationships with CSUMB-Sustainable Hospitality Program and Monterey Peninsula College.

3. Membership on the Monterey County WDB requires that each member attend a full WDB meeting every two months, attend training sessions for board members and become an advocate for workforce development. The time commitment for these activities ranges from a minimum of 4 to 10 hours per month. Can you make that time commitment? Yes ☒ No ☐

4. Membership on the Monterey County WDB requires that each member serves on a sub-committee. The time commitment for this activity ranges from a minimum of 3 to 4 hours per month. Can you make that time commitment? Yes ☒ No ☐

5. Why do you wish to serve on the Monterey County WDB? (Describe in 100 words or less)

I am interested in collaborating with community leaders to meet the needs and provide opportunities for the Monterey County Workforce. With my experience in hospitality industry, I feel I can provide insight and contribute to the conversation. I am interested in ensuring that businesses know and understand the many benefits available through the Workforce Development Board. In addition, serving on the board would also provide an opportunity for my continued growth as a Director of Human Resource professional and as a citizen of Monterey County.

## *Signature and Acknowledgement*

I, the undersigned, certify that the information on this application is true and correct to the best of my knowledge and that, if appointed to serve, I will do so to the best of my ability and in the best interest of Monterey County and its citizens.

Signature: 

Date: 4/30/2025





# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval of Reappointment of Salvador Munoz,  
Representing Business

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board approves the Executive Committee's June 12, 2025, recommendation to reappoint Salvador Munoz, representing Business, to the Monterey County Workforce Development Board.

**BACKGROUND:**

Mr. Munoz, Architect, S. Munoz and Associates, has reapplied for membership to the full Workforce Development Board.

The WDB bylaws state that the term of membership for all WDB members shall be three years. The three-year term limit was enacted with the approval of the original WDB bylaws by the Board of Supervisors on June 23, 2015.

**ATTACHMENTS:**

Mr. Salvador Munoz's application



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## Monterey County Workforce Development Board (WDB) Membership Application

Name: SALVADOR MUNOZ Date Submitted: 3/14/2025  
Title: Architect  
Business/Organization Name: S. Munoz Architects

### Representation

Please select from one of the following categories that you represent: (*Federal Register Section 679.320*)

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Business  | <input type="checkbox"/> Local Educational Entity                    |
| <input type="checkbox"/> Labor Organization   | <input type="checkbox"/> Community-Based Organization                |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Wagner-Peyser                               |
| <input type="checkbox"/> Rehabilitation       | <input type="checkbox"/> Chief Elected Official/Board of Supervisors |

### Contact Information

Business/Organization Name: S. MUNOZ AND ASSOCIATES  
City: SALINAS State: CA Zip code: 93901  
Phone: [REDACTED] Fax: -  
Mobile: [REDACTED]  
Email address: munfris@hotmail.com  
Website address: www.smunozarchitects.com  
Business license number: [REDACTED]  
City of residence: [REDACTED]

### Business Related Questions

Please answer the following questions and attach any additional pages, if necessary:

- Number of current employees: 2
- Number of years with current business/organization: 25
- Number of years in business in Monterey County: 30
- Please describe the nature of your business and your position: ARCHITECTURAL DESIGN, HISTORICAL RESTORATION

5. Please list your current chamber and association memberships, the duration of each membership and the positions you currently hold:

AIA AMERICAN INSTITUTE OF ARCHTECTS, AMAP ALLIANCE OF MONTEREY AREA PRESERVACIONISTS

6. Please list any professional award(s) or recognition you have received within the last 5 years:

2001-02

7. As a member of your business with optimum policy authority, please describe your responsibilities within your organization:

ARCHITECT APPLY AND UPDATE TRAINING ON FEDERAL, STATE, COUNTY AND CITY CODES, PUBLIC RELATIONS, PORTFOLIO MANAGMENT, DIRECTION AND ADMINISTRATION

## Monterey County WDB Related Questions

Please answer the following questions and attach any additional pages, if necessary:

1. What do you hope to contribute from your participation on the Monterey County WDB

PARTICIPATE IN CARRER DAYS AT EDUCATIONAL INSTITUTIONS INCLUDING BUT NOT LIMITED TO HARTNELL COLLEGE TO PRESENT OPORTUNITIES TO THE WORKFORCE WITH APPLIED TECHNOLOGY AND SHARE HANDS-ON EXPERIENCE

2. What experience in the areas of fundraising, budget analysis, workforce policy development, youth services, knowledge of the labor market, and community involvement or linkages with educational agencies do you bring to the Monterey County WDB, as applicable?

YOUTH SERVICES, FORMER COLLEGE PROFESSOR, COMMUNITY INVOLVED PRACTICE, RELATIONS WITH DIFFERENT BOARDS AND INSTITUTIONS ACROSS COUNTY AND STATE LIKE HARTNELL COLLEGE, PLENTY KNOWLEDGE OF THE LABOR MARKET AND TREN

3. Membership on the Monterey County WDB requires that each member attend a full WDB meeting every two months, attend training sessions for board members and become an advocate for workforce development. The time commitment for these activities ranges from a minimum of 4 to 10 hours per month. Can you make that time commitment? Yes ☒ No ☐

4. Membership on the Monterey County WDB requires that each member serves on a sub-committee. The time commitment for this activity ranges from a minimum of 3 to 4 hours per month. Can you make that time commitment? Yes ☒ No ☐

5. Why do you wish to serve on the Monterey County WDB? (Describe in 100 words or less)

I want to support workforce development by leveraging my experience in education, labor market trends, and community engagement. As a former professor and active professional, I understand job market challenges and collaborate with institutions to strengthen workforce programs. My goal

## Signature and Acknowledgement

I, the undersigned, certify that the information on this application is true and correct to the best of my knowledge and that, if appointed to serve, I will do so to the best of my ability and in the best interest of Monterey County and its citizens.

Signature: \_\_\_\_\_ Date: 3-14-2025



# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval of Reappointment of Michael Gutierrez,  
Representing Education

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board approves the Executive Committee's June 12, 2025, recommendation to reappoint Michael Gutierrez, representing Education, to the Monterey County Workforce Development Board.

**BACKGROUND:**

Mr. Gutierrez, Superintendent/President of Hartnell College, has reapplied for membership to the full Workforce Development Board.

The WDB bylaws state that the term of membership for all WDB members shall be three years. The three-year term limit was enacted with the approval of the original WDB bylaws by the Board of Supervisors on June 23, 2015.

**ATTACHMENTS:**

Mr. Michael Gutierrez's application



344 Salinas Street, Suite 101 | Salinas, CA 93901

## Monterey County Workforce Development Board (WDB) Membership Application

Name: MICHAEL GUTIERREZ Date Submitted: NOVEMBER 16, 2023  
Title: SUPERINTENDENT/PRESIDENT  
Business/Organization Name: HARTNELL COMMUNITY COLLEGE DISTRICT

### Representation

Please select from one of the following categories that you represent: (*Federal Register Section 679.320*)

- |   |  |
|---|--|
| <input type="checkbox"/> Business             | <input checked="" type="checkbox"/> Local Educational Entity         |
| <input type="checkbox"/> Labor Organization   | <input type="checkbox"/> Community-Based Organization                |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Wagner-Peyser                               |
| <input type="checkbox"/> Rehabilitation       | <input type="checkbox"/> Chief Elected Official/Board of Supervisors |

### Contact Information

Business/Organization Name: HARTNELL COMMUNITY COLLEGE DISTRICT  
City: SALINAS State: CA Zip code: 93901  
Phone: [REDACTED] Fax: [REDACTED]  
Mobile: [REDACTED]  
Email address: mjgutierrez@hartnell.edu  
Website address: www.hartnell.edu  
Business license number: [REDACTED]  
City of residence: [REDACTED]

### Business Related Questions

Please answer the following questions and attach any additional pages, if necessary:

1. Number of current employees: 888 (348 FT; 242 PT; 298 student workers, professional experts, substitutes)
2. Number of years with current business/organization: 1.5 years
3. Number of years in business in Monterey County: 102
4. Please describe the nature of your business and your position: Higher Education / Superintendent/President

5. Please list your current chamber and association memberships, the duration of each membership and the positions you currently hold:  
Member of Salinas Rotary and Salinas Valley Chamber
6. Please list any professional award(s) or recognition you have received within the last 5 years:  
Elected to American Association of Community Colleges, Selected as a 2023 ASPEN President's Fellowship
7. As a member of your business with optimum policy authority, please describe your responsibilities within your organization:  
I serve as the CEO of the Hartnell CCD

### *Monterey County WDB Related Questions*

Please answer the following questions and attach any additional pages, if necessary:

1. What do you hope to contribute from your participation on the Monterey County WDB  
I hope to support workforce development in the region through the connections at Hartnell College.
2. What experience in the areas of fundraising, budget analysis, workforce policy development, youth services, knowledge of the labor market, and community involvement or linkages with educational agencies do you bring to the Monterey County WDB, as applicable?  
I am experienced in these areas through my work at Hartnell and through by previous position as President at Sacramento City College.
3. Membership on the Monterey County WDB requires that each member attend a full WDB meeting every two months, attend training sessions for board members and become an advocate for workforce development. The time commitment for these activities ranges from a minimum of 4 to 10 hours per month. Can you make that time commitment? Yes ☒ No ☐
4. Membership on the Monterey County WDB requires that each member serves on a sub-committee. The time commitment for this activity ranges from a minimum of 3 to 4 hours per month. Can you make that time commitment? Yes ☒ No ☐
5. Why do you wish to serve on the Monterey County WDB? (Describe in 100 words or less)  
One of the critical missions of Hartnell is to be the engine of economic and workforce development. It is my desire to collaborate and establish partnerships that will benefit Monterey County, its economy, and residents.

### *Signature and Acknowledgement*

I, the undersigned, certify that the information on this application is true and correct to the best of my knowledge and that, if appointed to serve, I will do so to the best of my ability and in the best interest of Monterey County and its citizens.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

12/8/23



## MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval of Reappointment of Cesar Lara,  
Representing Labor

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Workforce Development Board approves the Executive Committee's June 12, 2025, recommendation to reappoint Cesar Lara, representing Labor, to the Monterey County Workforce Development Board.

**BACKGROUND:**

Mr. Lara, Director of Workforce and Economic Development, Monterey Bay Central Labor Council / California Labor Federation, has reapplied for membership to the full Workforce Development Board.

The WDB bylaws state that the term of membership for all WDB members shall be three years. The three-year term limit was enacted with the approval of the original WDB bylaws by the Board of Supervisors on June 23, 2015.

**ATTACHMENTS:**

Mr. Cesar Lara's application





344 Salinas Street, Suite 101 | Salinas, CA 93901

## Monterey County Workforce Development Board (WDB) Membership Application

Name: Cesar Lara Date Submitted: June 4, 2024  
Title: Director of Workforce and Economic Development  
Business/Organization Name: Monterey Bay CLC / California Labor Fed

### Representation

Please select from one of the following categories that you represent: (*Federal Register Section 679.320*)

- |  |  |
|--|--|
| <input type="checkbox"/> Business                      | <input type="checkbox"/> Local Educational Entity                    |
| <input checked="" type="checkbox"/> Labor Organization | <input type="checkbox"/> Community-Based Organization                |
| <input type="checkbox"/> Economic Development          | <input type="checkbox"/> Wagner-Peyser                               |
| <input type="checkbox"/> Rehabilitation                | <input type="checkbox"/> Chief Elected Official/Board of Supervisors |

### Contact Information

Business/Organization Name: Monterey Bay Central Labor, AFL-CIO  
City: Salinas State: Ca Zip code: 93905  
Phone: [REDACTED] Fax: \_\_\_\_\_  
Mobile: [REDACTED]  
Email address: cesar@calaborfed.org  
Website address: www.MBCLC.org  
Business license number: \_\_\_\_\_  
City of residence: [REDACTED]

### Business Related Questions

Please answer the following questions and attach any additional pages, if necessary:

1. Number of current employees: 20
2. Number of years with current business/organization: 18 years at MBCLC and 2 years at CLF
3. Number of years in business in Monterey County: 1955
4. Please describe the nature of your business and your position: Labor organization

5. Please list your current chamber and association memberships, the duration of each membership and the positions you currently hold:

That information is listed at <https://www.linkedin.com/in/cesar-lara-05397b15/>

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6. Please list any professional award(s) or recognition you have received within the last 5 years:
- 

7. As a member of your business with optimum policy authority, please describe your responsibilities within your organization:
- 

## *Monterey County WDB Related Questions*

**Please answer the following questions and attach any additional pages, if necessary:**

1. What do you hope to contribute from your participation on the Monterey County WDB

Would like to continue support around Labor and Economic Development

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2. What experience in the areas of fundraising, budget analysis, workforce policy development, youth services, knowledge of the labor market, and community involvement or linkages with educational agencies do you bring to the Monterey County WDB, as applicable?

I've been a regular on the WIB and other boards for years, and I'm delighted to support the WIB's work.

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3. Membership on the Monterey County WDB requires that each member attend a full WDB meeting every two months, attend training sessions for board members and become an advocate for workforce development. The time commitment for these activities ranges from a minimum of 4 to 10 hours per month. Can you make that time commitment? Yes ☒ No ☐

4. Membership on the Monterey County WDB requires that each member serves on a sub-committee. The time commitment for this activity ranges from a minimum of 3 to 4 hours per month. Can you make that time commitment? Yes ☒ No ☐

5. Why do you wish to serve on the Monterey County WDB? (Describe in 100 words or less)

I am eager to contribute to the WIB and help shape policies and programs that strengthen workforce readiness and economic growth throughout our diverse county

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## *Signature and Acknowledgement*

I, the undersigned, certify that the information on this application is true and correct to the best of my knowledge and that, if appointed to serve, I will do so to the best of my ability and in the best interest of Monterey County and its citizens.

Signature: \_\_\_\_\_

Date: June 4, 2025

# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Consider and Approve New Policies

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) consider and approve the following new policies.

**New Policies:**

1. **Draft #2025-06: On-the-Job Training (OJT) Policy and Procedures**

**Applicable to:** MCWDB staff and service provider staff.

**Purpose:** This policy provides guidance and establishes the procedures for the implementation of OJT opportunities funded by the Workforce Innovation and Opportunity Act (WIOA) for eligible Adult, Dislocated Worker, and Youth program participants.

2. **Draft #2025-07: Auditing and Audit Resolution Policy**

**Applicable to:** All subrecipients receiving WIOA funds.

**Purpose:** This policy provides the auditing requirements and the audit resolution process for entities receiving WIOA funding to meet the Office of Management and Budget's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance).

Attachment:

- Draft #2025-06 On-the-Job Training (OJT) Policy and Procedures
- Draft #2025-07 Auditing and Audit Resolution Policy

## ON-THE-JOB TRAINING (OJT) POLICY AND PROCEDURES

### EXECUTIVE SUMMARY

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This policy provides guidance and establishes procedures for the implementation of WIOA-funded On-the-Job Training (OJT) opportunities for eligible Adult, Dislocated Worker and Youth program participants.

### REFERENCES

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- WIOA Section 3.
  - WIOA Section 134(c)(H).
  - WIOA Section 188(a)(2) and (3).
  - 20 CFR 680.700, 680.710, 680.720, and 680.730.
  - 20 CFR 683.260, 683.265, 683.270 and 683.275.

### BACKGROUND

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On-the-Job Training (OJT) is a training option that provides employers the opportunity to train new employees (trainees) in the specific knowledge or skills essential to the full and adequate performance of the job. The Monterey County Workforce Development Board (MCWDB) service providers' OJT PROGRAM staff will contract with employers to provide OJT opportunities for Workforce Innovation and Opportunity Act (WIOA) program participants. The OJT PROGRAM provides the employer with a partial wage reimbursement, typically up to 50 percent of the wage rate of the participant for the extraordinary costs of providing the training and supervision related to the training. However, Section 134(c) of WIOA authorizes local boards to reimburse employers up to a maximum of 75 percent of the wage rate of an OJT participant, after considering factors listed in 20 CFR 680.730 and this policy.

### PROCEDURAL GUIDANCE

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OJT is a hire-first program. The trainee begins their OJT as a full-time employee of the company that has agreed to provide on-site training and long-term employment upon completion of the OJT. The rate of pay, fringe benefits, periodic pay increases, and working conditions offered to the trainee must be the same as similarly situated employees in similar positions with the same employer and in accordance with Section 6(a)(1) of the Fair Labor Standards Act of 1938 (29.U.S.C. 206(a)) or the applicable state or local minimum

wage laws.

OJT must be provided through a contract for a structured training opportunity for the OJT trainee to gain the knowledge and skills to be competent in the job for which they are hired. The contract must be completed and signed by all parties before the OJT trainee may begin OJT training. Participants are not eligible for the OJT program if they have previously participated or intend to participate in any other WIOA program services such as work experience, customized training or occupational skills training.

Please note: completing the requirements for an OJT opportunity will not guarantee approval for OJT training. Each request for OJT will be reviewed and evaluated on a case-by-case basis.

### **On-The-Job Training Prerequisites and Documentation:**

1. Participants must have a resume demonstrating that they have the experience and skill level to meet all requirements of an OJT opportunity.
2. Participants must have a WorkKeys Certificate at a level 3 or higher, unless the WorkKeys requirement for a specific program has been waived by MCWDB.
3. Participants must reside in the MCWDB's Service Delivery Area (Monterey County).
4. Participants must have an initial career advising session and an Individual Employment Plan (IEP).

### **WIOA Case Manager Responsibilities:**

1. Provide the participant with an initial career advising session.
2. Ensure that the participant has completed a WorkKeys assessment at level 3 or higher, unless the WorkKeys requirement for a specific program has been waived by MCWDB.
3. Provide comprehensive participant case notes in CalJOBS to ensure that sufficient documentation exists to support a future recommendation for OJT.
4. Ensure that the participant resides in Monterey County.
5. Complete and provide a participant's Work Ready Checklist to MCWDB Business Services for OJT Program staff to determine which OJT employer would provide the best fit to train a specific participant.
6. Once the participant starts training, check in each month with participant and enter appropriate CalJOBS activity codes and case notes to explain any additional services provided during the OJT.

### **Service Provider Staff Responsibilities:**

1. Evaluate the documentation provided by the WIOA case manager to ensure that the participant meets all the requirements for the OJT.
2. Meet with the participant for the initial interview and review of documents.
3. If an OJT program is appropriate for the participant, identify an employer who is interested in hiring the participant and obtain the job description for the position that the participant will be hired for.
4. Develop a Training Plan for the OJT with the employer to align with the participant's IEP, while cross-referencing the participant's resume and the job description.
5. Create the OJT agreement, and review and discuss the OJT training plan and OJT agreement with the employer and the participant.
6. Compile all forms in the OJT packet and submit the agreement for review of documents, case notes and IEP.
7. Submit the packet to MCWDB's fiscal unit for processing.
8. Upload OJT documents in CalJOBS and provide a copy to the employer.
9. Upload the OJT activity code and participant case notes in CalJOBS.
10. Once the participant starts training, check in monthly with the employer to gather feedback.
11. Obtain and review all OJT employer reimbursement documents, including:
  - OJT Training Invoice

- OJT Clarification of Hours
  - Progress Report Form
  - Timesheets
  - Employee paycheck stubs
12. Create and include the participant's OJT Completion Certificate with the final OJT invoice and enter the client's Measurable Skills Gain in CalJOBS for completion of the OJT.
  13. Compile all forms in the OJT invoice packet and submit the agreement via email to the Quality Assurance Manager, who will review the documentation, including case notes and IEP.
  14. Once Quality Assurance Manager approval has been obtained, collect signatures on the OJT Invoice and submit the OJT reimbursement packet to MCWDB's fiscal unit.
  15. Upload the OJT invoice into CalJOBS.

### **Participant Eligibility**

Participants must meet program eligibility requirements for a WIOA funding source, e.g., for WIOA Adult, Dislocated Worker or Youth formula funded programs. Candidates for an OJT position must have received a WorkKeys assessment at level 3 or higher and must have an IEP showing the interest, aptitude, and skills to meet the requirements of an OJT employer.

### **Employer Eligibility**

The OJT employer:

- Must have operated its business in the Local Area (Monterey County) for a minimum of 120 days and be current in unemployment insurance and workers' compensation taxes, penalties, and /or interest or related payment plan.
- Must be financially solvent to meet the OJT contract obligations through the end of the training and for the participant's 12-month follow up period and must have adequate payroll record-keeping systems that track hours worked, gross pay, deductions and net pay.
- Must not have relocated within the last 120 days, where relocation resulted in the loss of employment at the prior location. (20 CFR 683.260)
- Shall not displace any currently employed worker or alter current workers' promotional opportunities, nor have terminated any regular employee or otherwise reduced the workforce in order to hire OJT trainees. (20 CFR 683.270)
- Must not be involved in a labor dispute or have workers currently in a layoff status or have laid off workers over the past 120 days from the same or any substantially equivalent job. The period of 120 days may be waived if there are mitigating circumstances reviewed and approved by a WIOA Program Administrator.
- Must not impair existing contracts for services or collective bargaining agreements and must gain written concurrence with the appropriate labor organization before the OJT can begin if the OJT agreement would be inconsistent with a collective bargaining agreement. (WIOA Sec.181 (a)(2)(B); additionally, the employer must attest that the OJT agreement would not assist, promote or deter union organizing (20 CFR 680.850).
- Must not allow OJT trainees to work on the construction, maintenance or operation of any facility that is used for sectarian activities or as a place of worship (WIOA Section 188 (a)(3)).
- Must not illegally discriminate in training or hiring practices because of race, color, sex, national origin, religion, disability, political beliefs or affiliations, or age (WIOA Sec. 188(a)(3)).

- Shall not have previously exhibited a pattern of failing to provide OJT trainees with continued long-term employment. (20 CFR 680.700(b))

### **Employer Reimbursement Rates**

The employer reimbursement rates of the regular wages earned for OJTs range from a minimum of 50 percent to a maximum of 75 percent. The reimbursement rate is based on the size of the employer as follows:

- A maximum of 50 percent for large employers (defined as having 100 or more employees);
- A maximum of 65 percent for medium size employers (defined as having 20-99 employees); and
- A maximum of 75 percent for small employers with a workforce of 1-19 employees.

### **Maximum Cost Per Participant**

Subject to funding availability and the OJT trainee's needs, OJT training costs are not to exceed \$8,000. Under special circumstances, training costs in excess of \$8,000 may be authorized by the WDB's Executive Director. Wages for OJT participants can be no less than \$16.50 per hour or the current minimum wage in California, whichever is higher.

### **The OJT Contract**

Every OJT opportunity will include a contract (agreement) with the OJT employer and a Training Plan for the trainee and requires a written, signed agreement between OJT PROGRAM staff and an authorized employer representative prior to the start of work. At a minimum, an OJT contract must comply with the requirements of Sections 194(1) and (4) and 101(44) of the WIOA and must include the occupation, skills and competencies to be learned and the length of time the training will be provided. Contract modifications must be in writing, signed and dated by all parties prior to the effective date of the modification. Verbal modifications are not valid. The OJT Contract will be placed in the participant's case file and the OJT employer file, described below.

Maximum OJT contract hours are based on the number of hours in training over a fixed calendar period. The maximum number of hours for an OJT must not exceed 1,040 hours (six months).

### **Training Plan (IEP) Elements**

An OJT program is not intended for long-term, continued training within the occupation. An OJT contract must be limited to the period required for a participant to become proficient in the occupation for which the training is being provided. In determining the appropriate length of the contract, consideration should be given to the skill requirements of the occupation, the academic and occupational skill level of the participant, prior work experience, the participant's individual employment plan and local office budgets. Actual training hours will be negotiated between the employer and OJT PROGRAM staff. All determinations must be documented.

The Training Plan in the participant's IEP must include the following elements:

1. The occupation(s) for which training is to be provided.
2. The duration of the training.
3. The wage rate to be paid to the trainee.
4. The rate of reimbursement.
5. The maximum amount of the reimbursement.
6. A training outline reflecting the work-related skills required for the position.



## **Participant Case File**

All documentation relative to the selection of a candidate for an OJT opportunity and the development and maintenance of the participant's OJT Training Plan should be included in the participant's case file. OJT participant files must be available to federal, state and local monitors for compliance review.

## **OJT Employer Files**

OJT employers are required to keep an individual file for each OJT employee which includes the employer pre-screening checklist verifying employer eligibility. Employer files must be available to federal, state and local monitors for compliance review.

## **OJT Monitoring**

- Monitoring at the local, state and federal level will include the MCWDB staff's oversight of the OJT training and corresponding employer payroll records.
- On-site monitoring visits should be conducted by OJT PROGRAM staff shortly after the OJT trainee begins work, with additional monthly visits scheduled at appropriate intervals (as determined by duration of OJT Training Plan).
- Effective monitoring also includes desk review of correspondence from the employer, including OJT reimbursement invoices and required documentation to support those invoices.
- OJT PROGRAM staff shall regularly review each OJT trainee's progress toward meeting program and service strategy objectives, including the trainee's acquisition of basic occupational skills and the adequacy of supportive services provided as related to OJT.
- Any deviations from the OJT agreement should be dealt with immediately and documented promptly.

## **Exceptions**

Any exceptions to this policy must be approved by the WDB's Executive Director and documented in both the OJT trainee and OJT employer's files.

## **ATTACHMENTS:**

- a) Work Ready Checklist

## **INQUIRIES**

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If you have questions, please contact staff at (831) 796-3505. This policy is posted on the WDB website located at: [www.montereycountywdb.org](http://www.montereycountywdb.org).

CHRISTOPHER DONNELLY, Executive Director  
Monterey County Workforce Development Board

## AUDITING AND AUDIT RESOLUTION POLICY

### EXECUTIVE SUMMARY

This policy provides the auditing requirements and the audit resolution process for entities receiving Workforce Innovation and Opportunity Act (WIOA) funds to meet the Office of Management and Budget's (OMB) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). This policy applies to all subrecipients receiving WIOA funds.

### REFERENCES

- Public Law 128, The Workforce Innovation and Opportunity Act, Sec. 184, Fiscal Controls and Sanctions
- Title 2 Code of Federal Regulations (CFR) Part 200: Uniform Guidance
- Title 2 CFR, Chapter II, Subpart F, 200.501
- Title 2 CFR, Chapter II, Subpart F, 220.521 (c)
- Title 2 CFR Part 2900: DOL Exceptions
- Title 20 CFR Sections 667.200(b), 667.500(a), 667.510, 683.210, and 683.420
- Title 29 CFR Section 38.9, 95.26, 96.53, and 97.26
- Training and Employment Guidance Letter (TEGL) 15-14, *Implementation of the New Uniform Guidance Regulations* (December 19, 2014)
- One-Stop Comprehensive Financial Management Technical Assistance Guide
- Title 22 CCR Division 1, Subdivision 2, Chapter 2, Section 5050-5070
- Employment Development Department (EDD) Workforce Services Directive (WSD) 22-07, *Debt Collection* (November 14, 2022)
- WSD20-23, *Audit Requirements*
- WSD16-05, *WIOA Closeout Requirements* (July 29, 2016)

### BACKGROUND

On December 26, 2013, the new Super Circular was established through 2 CFR Part 200, Subpart F Audit Requirements, which generally requires that single audits be performed annually. In certain limited situations,

biennial audits are allowed. The following section summarizes the requirements and significant changes of the revised circular.

- a. Audit threshold increased from \$500,000 to \$750,000 expended. (\$750,000 after December 26, 2014)
- b. Determination of high-risk programs no longer based solely on level of expenditures. The auditor now determines these based on the following:
  1. Current and prior audit experience
  2. Oversight performed by the Federal agency and others
  3. Inherent risk of the Federal program
- c. Assignment of Federal agency is now based on dollar threshold of awards received, not by the Office of Management and Budget (OMB).
- d. Subrecipient Responsibilities
  1. Identify and account for Federal awards
  2. Maintain internal controls over Federal funds
  3. Comply with laws, regulations and contracts
  4. Prepare required financial statements, etc.
  5. Ensure that requirements are met per Title 2 CFR Part 200, Subpart F
  6. Follow-up and resolve audit findings
- e. Auditors
  1. The auditor that does the audit shall not prepare the subrecipient's indirect cost proposal or cost allocation plan, when indirect costs exceed \$1 million in the prior year.
  2. The Single Audit Act amendments will require the auditor to express an opinion on whether the schedule of expenditures of Federal award is fairly presented in all material aspects in relation to the financial statements.
- f. Reporting
  1. Reports must be submitted no later than nine months after the end of the year audited, or within 30 days after issuance of the auditor's report to the subrecipient, whichever is earlier.
  2. Subrecipient Reporting Requirements
    - a) Financial Statements
    - b) Schedule of Federal awards expenditures
    - c) Summary schedule of prior audit findings:

Includes status of all audit findings included in the auditor's prior year schedule of findings and questioned costs of Federal award. Additionally, includes the status of findings reported in the subrecipient's prior year summary schedule of prior findings until resolved or no longer valid. To be considered no longer valid, the following must apply:

      - 1) Two years have passed since the audit report in which the finding occurred was submitted;
      - 2) Federal agency or grantor is not currently pursuing an audit finding; and
      - 3) No management decision was issued
    - d) Corrective action plan, where the auditor identifies audit findings for:
      - 1) Material noncompliance with individual compliance requirements for a major program; or
      - 2) Material weaknesses in the subrecipient's internal controls
    - e) Data collection form – Title 2 CFR Part 200, Subpart F requires completion of a data collection form. The Federal government intends the Data Collection Form to be a tool that summarizes single audit related data. (This form for the most part is filed by the auditor for

and on behalf of the auditee.)

- 1) When a program-specific audit guide is available, the auditee must electronically submit to the Federal Audit Clearinghouse (FAC) the data collection form prepared in accordance with §200.512 Report submission, paragraph (b), as applicable to a program-specific audit, and the reporting required by the program-specific audit guide.
- 2) When a program-specific audit guide is not available, the reporting package for a program-specific audit must consist of the financial statement(s) of the Federal program, a summary schedule of prior audit findings, and a corrective action plan as described in paragraph (b)(2) of this section, and the auditor report(s) described in paragraph (b)(4) of this section. The data collection form prepared in accordance with §200.512 Report submission, paragraph (b), as applicable to a program-specific audit, and one copy of this reporting package must be electronically submitted to the FAC.

g. Audit Costs

1. Single Audit Act amendments establish a requirement that the percentage of the audit costs charged to Federal Awards generally cannot be greater than the ratio of the entity's Federal awards expended to its total expenditures.
2. A greater percentage can be charged only if the entity can demonstrate that the cost of auditing the Federal awards was higher.
3. If an entity expends less than \$750,000 in Federal awards, they may not charge single audit costs to the Federal awards. They may be allowed to charge the cost of limited scope audits to monitor subrecipients.

## DEFINITIONS

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*Administrative finding* – a finding that is non-monetary and related to procedural or administrative matters.

*Auditee* – a non-federal entity that expends federal awards which must be audited under Uniform Guidance Subpart F – Audit Requirements. (Uniform Guidance Section 200.6)

*Auditor* – an auditor who is a public accountant or a federal, state, local government, or Indian tribe audit organization that meets the general standards specified for external auditors in generally accepted government auditing standards (GAGAS). The term auditor does not include internal auditors of nonprofit organizations. (Uniform Guidance Section 200.7)

*Awarding agency* – means (1) with respect to a grant, Department of Labor (DOL); and (2) with respect to a subgrant or contract, the entity that awarded the subgrant or contract.

*Disallowed costs* – those charges to a federal award that the federal awarding agency or pass-through entity determines to be unallowable according to the applicable federal statutes, regulations, or the terms and conditions of the federal award.

*Federal award* – federal financial assistance that a non-federal entity receives either directly from a federal awarding agency or indirectly from a pass-through entity. (Uniform Guidance Section 200.38)

*Final Determination* – the awarding agency's final decision to disallow the cost and the status of nonmonetary findings.

*Informal resolution* – a reasonable period of time (not more than 6 months) from the date of issuance of the initial determination to informally resolve matters in which the recipient/contractor disagrees with the decisions of the awarding agency on the allowability of questioned costs or activities.

*Initial Determination* – a preliminary decision on whether to allow or disallow questioned costs and resolve any non-monetary (administrative) findings. The initial determination is based on applicable statutes, regulations, administrative directives, or terms and conditions of the grant/contract award instrument. It offers the auditee/subrecipient an opportunity for informal resolution, not a formal hearing.

*Non-federal entity* – a state, local government, Indian tribe, institution of higher education, or nonprofit organization that carries out a federal award as a recipient or subrecipient. (Uniform Guidance Section 200.69)

*Pass-through entity* – a non-federal entity that provides a subaward to a subrecipient to carry out part of a federal program (Uniform Guidance Section 200.74). The EDD is the pass-through entity for WIOA Title I Adult, Dislocated Worker, and Youth programs, and other federal grant awards.

*Program-Specific Audit* – an audit of an individual federal program rather than a single audit of an entity's financial statements and federal programs. When an auditee expends federal awards under only one federal program (excluding research and development), and the federal program's statutes, regulations, or the terms and conditions of the federal award do not require a financial statement audit of the auditee, the auditee may elect to have a program-specific audit conducted in accordance with Uniform Guidance Section 200.507. A program-specific audit may not be elected for research and development unless all of the federal awards expended were received from one federal agency, or one federal agency and one pass-through entity, and that federal agency, or pass-through entity in the case of a subrecipient, approves in advance a program-specific audit.

*Recipient* – a non-federal entity that receives a federal award directly from a federal awarding agency to carry out an activity under a federal program. The term recipient does not include subrecipients. (Uniform Guidance Section 200.86)

*Single Audit* – a comprehensive review of an organization's financial activity for a fiscal year. All single audits must be conducted by an independent auditor in accordance with GAGAS. In order to determine whether the \$750,000 threshold is met, a non-federal entity must count the amount of federal awards received directly from federal agencies and pass-through entities.

*Stand-In Costs* – costs paid from non-federal sources to substitute federal costs that have been disallowed as a result of an audit. *Stand-in costs must come from the same year as the costs that they are proposed to replace and they must not cause a violation of the administrative or other cost limitation. These costs must be included in the appropriate expenditure reports if they will be used at a later time.*

*Subaward* – an award provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a federal program. A subaward may be provided through any form of legal agreement, including an agreement that the pass-through entity considers a contract. (Uniform Guidance Section 200.92)

*Subrecipient* – a non-federal entity that receives a subaward from a pass-through entity to carry out part of a federal program but does not include an individual that is a beneficiary of such program. A subrecipient may also be a recipient of other federal awards directly from a federal awarding agency (Uniform Guidance Section 200.93). Local Workforce Development Boards, including other agencies are the subrecipients of WIOA funds and other federal grant awards, and may allocate funds to their subrecipients to carry out a part of the federal program. This directive refers to both the awarding agency subrecipient and their subrecipients.

# AUDIT REQUIREMENTS

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## AUDITING ASSURANCES:

If exceeding the threshold of expenditures of the award received, subrecipients must have an independent financial and compliance audit performed annually for funds received by the subrecipient.

All audits must be conducted in accordance with applicable auditing standards set forth in the Functions developed by the Comptroller General of the United States and the requirements of the Single Audit Act, 2 CFR Part 200 (Subpart F), federal regulations, and state policy directives.

All draft reports will be treated in a confidential manner and only disseminated to the subrecipient's personnel with direct responsibilities towards the auditing process and program management. The audit report will be considered a public document upon official transmittal to the subrecipient.

To ensure that the audit responsibility is accomplished, the subrecipient shall have formal written policies established governing procedures for independent audits that include, but are not limited to:

- 1) Frequency of audits;
- 2) Procedures for debt collection and resolution of audits;
- 3) Audit bidding procedures;
- 4) Notification to subrecipients scheduled for audit;
- 5) Sanctions for non-performance by audit firms; and
- 6) Qualifications of the auditor

Subrecipients shall adhere to time frames established by the Monterey County Workforce Development Board, hereinafter referred to as the MCWDB, for the performance and resolution of independent audits.

All documents, records, work papers, etc. associated with the audit shall be retained for a minimum of three (3) years after the issuance of the audit report. If, prior to the expiration of the three year time period, any audit resolution, litigation, or a claim is instituted involving the grant covered by the records, the subrecipient shall retain the documentation beyond the period until the audit findings, litigation, or claim has been finally resolved.

Upon request, all subrecipients shall make available to MCWDB, its designated agents, federal and state access to all program documents and working papers. Access includes the right of designated agents to obtain copies of working papers, as is reasonable and necessary.

## AUDIT PROCEDURE SCOPE:

At a minimum, for major program or program specific audits, the scope must include the following:

### A. Allowable Costs

To be allowable, a cost must be necessary and reasonable for proper and efficient administration of the program and be allocable as such. Costs charged to the program must be consistent with those allowed in the Cost Principles.

### B. Classification of Costs

Allowable costs must be charged against the appropriate cost categories to the extent that benefits are received under that category and are consistent with the cost categories delineated in Federal regulations and OMB circulars.

### C. Cost Limitation by Category

The scope will include identification of cost limitations as set forth in the relevant Federal Act, Regulations and EDD directives.

D. Eligibility Compliance Requirement

Compliance requirements assist auditors to understand program objectives and procedures.

## AUDIT RESOLUTION

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### LOCAL AREA RESPONSIBILITIES FOR AUDIT RESOLUTION

A. The MCWDB Executive Committee

The MCWDB Executive Committee is designated as the official body responsible for ensuring that audit recommendations are resolved in a timely manner. The Executive Committee acts as the hearing body to resolve all audit issues that require a hearing. In addition, it is also responsible for ensuring that determinations made on audit recommendations are actually accomplished.

B. The MCWDB Executive Director

The MCWDB Executive Director is responsible for exercising executive level oversight of and advising the MCWDB Executive Committee on audit resolution activities. The MCWDB Executive Director will:

1. Review and make recommendations to the MCWDB Executive Committee on the resolution of audits which have not been resolved within six months;
2. Monitor ongoing audit resolution performance;
3. Consider and, when necessary as a last resort, make recommendations to the MCWDB Executive Committee concerning safeguards that should be established where subrecipients refuse to adequately correct deficiencies within a reasonable period of time or fail to comply with agreement on corrective actions.

C. The MCWDB Finance Manager

The MCWDB Finance Manager is responsible for the following:

1. Resolving all audit findings (management and system deficiencies as well as monetary findings, which affect the WIOA programs).
2. Monitoring the completion of resolution actions on program specific findings, which are contained in audit reports.
3. Formulating the MCWDB's policies and procedures; implementing audit policies and procedures and providing advice and assistance to the MCWDB Executive Director on audit resolution matters.
4. Accounting and controlling monetary audit disallowances and monitoring the collection status of these disallowances.

The MCWDB Finance Manager's responsibility with respect to an individual audit report is generally limited to the findings contained in the report. However, issues which are not specifically cited as findings per se should be pursued under the following circumstances:

- a. The report contains information which indicates that a serious problem may exist even though it is not cited as a finding;
- b. Experience in dealing with a given type of subrecipient indicates that the findings contained in the audit report are frequently indicative of other problems not covered in the report; or
- c. The MCWDB Finance Manager has specific knowledge of serious problems from other sources.

Where additional problems appear to exist, the MCWDB Finance Manager, prior to raising them with the audited subrecipient, should discuss them with the auditor and, if necessary, ask the auditor for additional information or audit coverage to determine whether the problems do, in fact, exist. Although it may occasionally be necessary to raise the problems described above after an audit report is issued, these problems should be brought to the attention of the MCWDB Executive Director when discovered.



## PROCEDURES

### I. Subrecipient Standards

- The MCWDB, the “awarding agency subrecipient,” is the agency who is directly funded and in a subgrant with the EDD.
- The MCWDB’s subrecipients, discussed below as “their subrecipient,” are the agencies at the local level that receive funds from the MCWDB to carry out a portion of the federally funded program.

A. Awarding agency subrecipients must review the audit report of their subrecipients to ensure compliance with the requirements of Uniform Guidance 2 CFR Part 200, Subpart F. If there are no concerns, a copy of the single audit must be kept on file and added to the audit control log as being compliant. If there are concerns, follow the following steps.

1. Establish an audit resolution file to document the disposition of reported questioned costs and corrective actions taken for all findings. The audit file may be saved electronically, or in a physical file or binder.
2. *Complete an audit control log.* The log must contain: date of the audit, period covered by the audit, date audit was received, auditor name, questioned costs (number of findings and amounts), administrative findings (number of findings), assigned audit number, date or dates of Initial and Final Determinations, and documentation of decisions regarding administrative findings, disallowed costs, and appeals. This log should include the review of all single audits including those that are compliant.
3. Issue a letter of Initial Determination to their subrecipient based on the audit review. The Initial Determination letter includes the following:
  - A list of all questioned costs.
  - Whether the costs are allowed or disallowed, including the reasons with appropriate citations for such actions.
  - Acceptance or rejection of any corrective action taken to date, including corrective action on non-monetary administrative findings.
  - Possible sanctions.
  - The opportunity for informal resolution of no more than 60 days from the date of Initial Determination.
4. During informal resolution, their subrecipient may provide documentation to support allowability of costs and proposed corrective action of administrative findings.

Informal resolution discussions may be held by telephone, video conference or in person, if practicable. When a meeting is held, provide a sign-in sheet. *The sign-in sheet must be retained as part of the audit file. The meeting must be documented either with a voice recording or written notes.* Negotiations of repayments can be initiated at this time.

5. Issue a written Final Determination to their subrecipient and include the following:
  - Reference to the Initial Determination.
  - Summation of the informal resolution meeting, if held.
  - Decisions regarding the disallowed costs, listing each disallowed cost and noting the reasons for each disallowance.
  - Questioned costs that have been allowed by the awarding agency and the basis for the

allowance.

- Demand for repayment of the disallowed costs.
  - Description of the debt collection process and other sanctions that may be imposed if payment is not received. See the debt collection process in *Debt Collection* (WSD22-07)
  - Rights to a hearing.
  - The status of each administrative finding.
  - Identified areas of disagreement between the parties.
  - Advise their subrecipient that the determination is based on information that is currently available. If new information becomes available, the Final Determination may be reopened at the awarding agencies option.
- B. The audit resolution process must be completed within six months after receipt of their subrecipient's audit report and must ensure that their subrecipient takes appropriate and timely corrective action.
- C. The audit file must be assembled for reference in the event of future action. Electronic files must be saved in a logical order (generally chronological) and contain all supporting documentation. Physical files must be tabulated with the most current documentation first. All audit files should include the following:
- Final Determination and proof of receipt by their subrecipient.
  - Additional documentation submitted as part of the informal resolution process:
    - Notes related to the informal resolution.
    - Sign-in sheets from any informal resolution meetings.
  - Initial Determination and proof of receipt by their subrecipient.
  - Response to the final audit report.
  - Final audit report.
- D. The awarding agency subrecipient has established local-level hearing procedures and reserves the right to overturn the decision of a hearing officer (in Monterey County, the MCWDB Executive Committee serves as the hearing body) when it determines that noncompliance with the applicable act or its regulations still exists.

The hearing allows both parties the right to present either written or oral testimony, call and question witnesses in support of their position, present oral and written arguments, examine records and documents relevant to the issues, and be represented. The hearing shall be documented either with a voice recording, written notes, or by court reporter.

Their subrecipient has 30 calendar days after the Final Determination is issued to submit a written request for a hearing. At least 10 calendar days before the hearing, written notice of the date and site of the hearing must be provided to their subrecipient. The 10-day notice may be shortened with written consent of both parties. Their subrecipient may withdraw the hearing request; the withdrawal request must be submitted in writing.

The hearing officer must issue a decision within 60 days of the request filing date.

Their subrecipient has 10 days from receipt of an adverse decision to file an appeal of the local hearing officer's adverse decision to the State Review Panel. If a local hearing is not held or the decision is not rendered timely, their subrecipient has 15 days from the date on which the hearing should have been held or the decision should have been issued to file an appeal with the State Review Panel.

If their subrecipient appeals the decision of the awarding agency subrecipient's hearing officer to the state, the awarding agency subrecipient will send the Compliance Review Office (CRO) the complete audit file and hearing transcripts for review by the State Review Panel.

Within 30 days of receipt by the CRO of their subrecipients written appeal, the State Review Panel will be convened to review all evidence and issue a decision based on the evidence without consideration of any imposed sanctions.

- E. There is no administrative appeal beyond the State Review Panel.
- F. The awarding agency subrecipient shall ensure correction of any unresolved administrative findings and will determine the status of the unresolved administrative findings through its monitoring process and determine that appropriate corrective action has been taken. A copy of the monitoring report substantiating the implementation of the appropriate corrective action must be filed with the audit report.

## II. State Audit Resolution

- A. If there are no audit findings, no further action will be taken regarding the audit.
- B. If the audit identifies an administrative finding, questioned costs, or cost recommended for disallowance, the CRO will do the following:
  - Establish an audit resolution file to document the disposition of each finding and the corrective action taken to resolve each finding and may request additional documentation.
  - Issue a written Initial Determination after the audit is reviewed.
  - Provide an opportunity for informal resolution and submission of additional documents within 60 days from the date of the notification of Initial Determination to resolve questioned costs and/or administrative findings.
  - Issue a written Final Determination.

### State Hearings

All appeals of state audit determinations, including amendments and withdrawals, shall be in writing.

The state hearing officer will provide written notice to the concerned parties of the date, time, and place of the hearing at least 10 calendar days before the scheduled hearing. Both parties will have the opportunity to present oral and written testimony, call and question witnesses in support of their position, present oral and written arguments, examine records and documents relevant to the issue(s), and be represented. The state hearing officer will prepare a proposed decision and submit to the EDD Director or designee. The EDD reserves the right to overturn the decision of the hearing officer.

There is no administrative appeal beyond this level.

### Stand-in Costs Policy

During the audit resolution process, the auditee may propose the use of stand-in costs to substitute for the disallowed costs. Stand-in costs must be actual expenses paid with nonfederal funds. To be considered, stand-in costs must be incurred for allowable WIOA costs that were reported as uncharged WIOA program costs, included within the scope of the audit, and accounted for in the auditee's financial system. Cash match in excess of the required match may also be considered for use as stand-in costs. To be accepted, the stand-in costs must come from the same year as the costs they propose to replace, and they must not cause a violation of the administrative or other cost limitations.

## Records Retention Policy

Awarding agency subrecipients and their subrecipients must retain all records of each WIOA allocation for a period of three years from the date of their last expenditure report submitted to the EDD Central Office Workforce Services Division. If any litigation, claim, or audit is started before the expiration of the three-year period, ALL records must be retained until all findings have been resolved and final action taken (Uniform Guidance Section 200.333).

## INQUIRIES

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If you have questions, please contact staff at (831) 796-3505.  
CHRISTOPHER DONNELLY, Executive Director  
Monterey County Workforce Development Board

## MEMORANDUM

**TO:** Workforce Development Board

**FROM:** Daisy Fernandez

**SUBJECT:** Approval of Dislocated Worker to Adult Program  
Funding Transfer

**DATE:** June 26, 2025

**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) ratify the Executive Committee's May 15, 2025, approval for staff to submit a request to the State Employment Development Department (EDD) to transfer \$963,000 of Dislocated Worker program funding to the Adult program.

**BACKGROUND:**

To maximize customer service and provide local workforce development boards with greater flexibility to respond to changes in the local labor markets, the Workforce Innovation and Opportunity Act (WIOA) allows the transfer of up to and including 100% of funds between Adult and Dislocated Worker programs. EDD has the authority to approve transfer requests on behalf of the Governor.

**DISCUSSION:**

Due to the low utilization of Dislocated Worker funds in Fiscal Year (FY) 2024–25 and the growing demand for training and employment services through the Adult program, MCWDB is requesting a reallocation of resources to better align with program needs. As of May 1, 2025, the Adult program has expended \$1,045,674 and has committed an additional \$251,591 in Individual Training Accounts (ITAs) and On-the-Job Training (OJT) contracts, surpassing the projected WIOA Adult training expenditures for FY 2024–25. To sustain this elevated level of activity, a transfer of \$963,000 from the Dislocated Worker program to the Adult program is proposed.

## Transfer of Funds Request Budget Plan

**Local Area** Monterey County Workforce Development Board
**Date Prepared** 5/16/2025
**Subgrant Number** AA511017  
**Year of Appropriation** 2024
**Grant  
Code**
**Adult to DW**
☐ 201 → 299

☐ 202 → 200

**DW to Adult**
☐ 501 → 499

☒ 502 → 500

FUNDING IDENTIFICATION	ADULT	DW
1. Formula Allocation	\$ 1,974,131.00	\$ 1,624,121.00
2. Prior Adjustments - Plus or Minus		
3. Previous Amounts Transferred		
4. Current Amount to be Transferred	\$ 963,000.00	\$ (963,000.00)
5. TOTAL FUNDS AVAILABLE (Lines 1 through 4)	\$ 2,937,131.00	\$ 661,121.00

TOTAL ALLOCATION COST CATEGORY PLAN		
6. Program Services (Lines 6a through 6c)	\$ 2,643,417.44	\$ 595,008.90
a. Career Services	\$ 1,278,794.00	\$ 567,448.65
b. Training Services	\$ 1,364,623.44	\$ 27,560.25
c. Other		
7. Administration	\$ 293,713.10	\$ 66,112.10
8. TOTAL (Lines 6 plus 7)	\$ 2,937,130.54	\$ 661,121.00

QUARTERLY TOTAL EXPENDITURE PLAN (cumulative)		
9. September		
10. December 20__		
11. March 2025	\$ 1,118,138.81	
12. June 2025	\$ 2,221,709.75	\$ 143,066.65
13. September 2025	\$ 2,937,130.54	\$ 572,266.96
14. December 2025	\$ -	\$ 661,121.00
15. March 20__		
16. June 20__		
17. September 20__		
18. December 20__		
19. March 20__		
20. June 20__		

COST COMPLIANCE PLAN (maximum 10%)		
21. % for Administration Expenditures (Line 7/Line 5)	10.00%	10.00%

Chris Donnelly, Executive Director
**Contact Person, Title**
831-759-6444
**Telephone Number**
**Comments**

## Transfer of Funds Request Participant Plan

**Local Area:** Monterey County Workforce Development Board
**Prepared Date** 5/16/2025

Enter the number of individuals in each category.

<b>TOTALS FOR PY 2025</b>	<b>ADULT</b>	<b>DW</b>
1. Registered Participants Carried in from PY 2024	212	31
2. New Registered Participants for PY 2025	295	37
3. Total Registered Participants for PY 2025 (Line 1 plus 2)	<b>507</b>	<b>68</b>
4. Exiters for PY 2025	250	30
5. Registered Participants Carried Out to PY 2025 (Line 3 minus 4)	<b>257</b>	<b>38</b>

<b>PROGRAM SERVICES</b>		
6. Career Services	<b>507</b>	<b>68</b>
a. Basic Career Services	507	68
b. Individualized Career Services	507	68
7. Training Services	223	16

Chris Donnelly, Executive Director
**Contact Person, Title**
831-759-6444
**Telephone Number**
**Comments:**

# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** 2025-28 One-Stop Partner MOU

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concurs with the June 12, 2025, recommendation of the Executive Committee to perform the following actions relating to submittal of the 2025-28 One-Stop Partner MOU:

1. Approve a Memorandum of Understanding (MOU) between the MCWDB and partners of the America's Job Centers of California/One-Stop system regarding delivery of job training and placement, and other social services, effective July 1, 2025, through June 30, 2028;
2. Authorize the Chair of the MCWDB to sign the MOU in compliance with the Workforce Innovation and Opportunity Act of 2014; and
3. Authorize the Chair of the MCWDB to execute amendments to the MOU to adjust cost allocations, add partners, and make other changes to its terms necessitated by changed circumstances occurring between July 1, 2025, and June 30, 2028.

**BACKGROUND:**

To establish a high-quality America's Job Center of California (AJCC) One-Stop delivery system, the Workforce Innovation and Opportunity Act of 2014 (WIOA) requires local workforce development boards to develop Memorandums of Understanding (MOUs) with other programs that provide specified services to the public. These programs are identified in WIOA as One-Stop partners.

MOUs between local workforce development boards and One-Stop partners provide for administration and delivery of WIOA services and related, complimentary services. The MOUs also establishes a visionary plan describing how local workforce development boards and One-Stop partners collaborate to create a cohesive service delivery system that best meets the needs of their shared customers. WIOA requires that the Chief Elected Official for local workforce areas approve One-Stop Partner MOUs.

The Employment Development Department (EDD) has directed local workforce development boards to ensure that, upon completion, the One-Stop Partner MOUs are signed by an authorized representative of the local board, the Chief Elected Official, and all AJCC partners. The One-Stop Partner MOU must be submitted to each local board's EDD Regional Advisor no later than 5:00 p.m. on June 30, 2025. Because some local boards may be unable to obtain all signatures by the deadline, a local board may



submit an unsigned copy of the MOU with an explanation for the absent signature(s) and the date by which a signed original will be sent.

**DISCUSSION:**

The MCWDB has formed strong working relationships with the following 19 service partners over several years:

1. Monterey County Workforce Development Board/ResCare Workforce Services - WIOA Title 1 Adult, Dislocated Worker, and Youth services
2. State of California Employment Development Department (EDD) - WIOA Title III Wagner-Peyser, Jobs for Veterans State Grant (JVSG), Trade Assistance Act (TAA), Unemployment Insurance (UI)
3. State of California Department of Rehabilitation - WIOA Title IV Department of Vocational Rehabilitation
4. North Monterey County Adult Education - WIOA Title II Adult Education and Literacy
5. Monterey County Office of Education (MCOE) Adult Education - WIOA Title II Adult Education and Literacy
6. Gonzales Adult School - WIOA Title II Adult Education and Literacy
7. Monterey Adult School - WIOA Title II Adult Education and Literacy
8. Pacific Grove Adult School - WIOA Title II Adult Education and Literacy
9. Salinas Adult School - WIOA Title II Adult Education and Literacy
10. Soledad Adult School - WIOA Title II Adult Education and Literacy
11. Hartnell College - WIOA Title II Adult Education and Literacy/Carl Perkins CTE
12. Monterey Peninsula College - WIOA Title II Adult Education and Literacy/Carl Perkins CTE
13. National Association for Hispanic Elderly (NAHE) - WIOA Title V Older Americans Act, Senior Community Service Employment Program
14. Monterey County Community Action Partnership - Community Services Block Grant
15. Housing Authority of the County of Monterey - Housing and Urban Development
16. Monterey County Department of Child Support Services
17. Center for Employment Training (CET) - Migrant and Seasonal Farmworkers
18. Monterey County Department of Social Services - TANF/CalWORKs Employment Services
19. Southern California American Indian Resource Center - Native American Programs

The One Stop Partners listed above are parties to the MOU presented to the Board for its approval in its role as Chief Elected Official of the Monterey County local workforce development area. The Board is also asked to authorize the Chair of the WDB to sign amendments to the MOU to adjust cost allocations, add partners, and make other changes arising from changes in circumstances occurring between July 1, 2025, and June 30, 2028.

In the proposed MOU, the One Stop partners providing services at the AJCC/One-Stop Center in Salinas and at One-Stop affiliate offices additionally agree on sharing infrastructure costs proportionate to their use of these sites and relative benefits received.

**NEXT STEPS:**

If the MCWDB approves the requested actions, the MOU will be forwarded to the Chief Elected Official – the Board of Supervisors – for approval and to request authorization for the Chair of the Board of Supervisors to sign the MOU.

Memorandum of  
Understanding between the  
Monterey County Workforce Development Board  
(County) and the partners of the  
America's Job Center of California / One-Stop Delivery System (Partners)

**I. Preamble/Purpose of MOU**

In accordance with Section 121(c) of the Workforce Innovation and Opportunity Act (WIOA), this Memorandum of Understanding (MOU) has been developed and executed between the Monterey County Workforce Development Board and the America's Job Center of California<sup>SM</sup> (AJCC) One-Stop System partners to establish an agreement concerning the operations of the AJCC / One-Stop delivery system. The purpose of the MOU is to establish a cooperative working relationship between the parties and to define their respective roles and responsibilities in achieving the policy objectives. The MOU also serves to establish the framework for providing services to employers, employees, job seekers and others needing workforce services.

California's one-stop delivery system, the AJCC, is a locally driven system which develops partnerships and provides programs and services to achieve three main policy objectives established by the California Workforce Development Board's Strategic Plan, which includes the following:

- Foster demand-driven skills attainment
- Enable upward mobility for all Californians
- Align, coordinate, and integrate programs and services

These objectives will be accomplished by ensuring access to high-quality AJCC / One-Stops that provide the full range of services available in the community for all customers seeking the following:

- Looking to find a job
- Building basic educational or occupational skills
- Earning a postsecondary certificate or degree
- Obtaining guidance on how to make career choices
- Seeking to identify and hire skilled workers

**II. Local Vision Statement, Mission, Statement, and Goals**

**A. Vision**

The Monterey County Workforce Development Board (MCWDB) vision is to improve the economy by promoting and supporting alignment of workforce and educational programs with priority industry sectors and local business needs. The MCWDB is designated by the Federal Workforce Innovation and Opportunity Act of 2014 (WIOA) and appointed by the Chief Elected Officials (CEO) to provide strategic policy, develop and enter memorandums of understanding with America's Job Center of California (AJCC) partners, designate or certify AJCC operators and conduct oversight and evaluation of the local workforce

development system. The MCWDB is charged with coordinating and leveraging workforce strategies between industry leaders, including organized labor, workforce professionals, education and training providers, and economic development leaders to develop workforce policies which support local economic growth and economic self-sufficiency. Collectively these stakeholders, will work together to ensure that local workforce development, career services, and job training programs critical to the community, are offered through the AJCC delivery system and meet the needs of job seekers and businesses while preparing an educated and skilled workforce.

## **B. Mission Statement**

To prepare and build a pipeline of an educated and skilled workforce, it is critical to know and understand the Coastal Regional Planning Unit (RPU) economic data, background analysis, and priority industry sectors so that local areas including MCWDB's local area may develop goals and strategies to prioritize investments where overall economic returns are likely to be highest, specifically in industry sectors that will generate significant gains in terms of jobs and income.

## **C. Principles and Goals of the AJCC Delivery System from a Local Viewpoint**

Key Strategic Goals, Strategies and Actions:

The MCWDB has identified three priority areas to organize its strategies for preparing an educated and skilled workforce over the next four years in partnership with core partners of the AJCC delivery system. The priority areas include:

### **1. Employer Engagement**

The Monterey County Workforce Development Board (MCWDB) prioritizes employer engagement to better align workforce efforts with the needs of local industries, particularly in high-priority sectors. The updated strategy includes:

- a) **Strengthening employer engagement initiatives** that connect job seekers with industry demands, with focused outreach to **small businesses** and **priority industry sectors**.
- b) **Implementing common performance measures** across partners to effectively track employer services and engagement activities.
- c) **Leveraging and expanding proven models**, including MCWDB's Sector Strategies, regional initiatives, and Labor Market Information (LMI) systems, to **minimize duplication** and enhance employer outreach.
- d) **Enhancing work-based learning opportunities**, such as internships, customized training, incumbent worker training, and registered apprenticeships, to improve workforce readiness and job placement outcomes.

### **2. Aligning Career Pathways and Sector Strategies**

MCWDB is committed to increasing the number of individuals who obtain **industry-recognized credentials and degrees** by aligning career pathways with sector strategies. Updated priorities include:

- a) **Developing stackable, industry-valued credentials and career pathways with multiple entry and exit points**, tailored to diverse populations including youth, adults, and dislocated workers.

- b) **Conveying employer input** through industry convenings to ensure training programs remain aligned with evolving workforce demands.
- c) **Collaborating with community colleges and other training providers** to design programs that align with sector strategies and support seamless career advancement.
- d) **Expanding services for out-of-school and disconnected youth**, including increased access to work experience and career opportunities in high-growth sectors.
- e) **Tracking progress toward self-sufficiency** using updated performance indicators, including livable wages, retention rates, credential attainment, job quality, and customer satisfaction.
- f) This approach advances **youth employment initiatives** and aligns directly with local strategies to **develop workforce skills** and ensure long-term economic sustainability.

### 3. System Alignment and Accountability

To build a responsive and effective workforce system, MCWDB is enhancing coordination, integration, and accountability among America's Job Center of California (AJCC) partners. The revised system alignment strategy includes:

- a) **Reducing duplication in services** and improving efficiency through enhanced **partner presence** at AJCC locations and expanded **virtual service delivery**.
- b) **Applying human-centered design principles** to refine the customer flow across all touchpoints—intake, assessment, referral, and job placement—focused on in-demand sectors.
- c) **Strengthening cross-agency partnerships** to better serve underrepresented and disadvantaged populations, including individuals with limited English proficiency, basic skills deficiencies, and other barriers to employment.
- d) **Implementing cost-sharing strategies** across the North Central Coast Regional Planning Unit to optimize investments in procurement, staff training, digital tools, and performance evaluation systems.
- e) **Offering cross-training for AJCC partner staff** to improve the effectiveness of services delivered to **priority populations**, including unemployed, underemployed, low-income individuals, veterans, individuals with disabilities, youth, and other vulnerable groups.

By aligning with the updated local and regional workforce development priorities, the MCWDB and its partners are committed to driving **continuous improvement, system integration, and equity in service delivery**. These efforts will ensure that Monterey County's workforce development system remains responsive, inclusive, and effective in meeting the needs of both job seekers and employers in a dynamic economy.

### III. Parties to the MOU

Required Core partners and Mandated Partners include local/regional representatives of the following programs:

- **WIOA Title I Adult, Dislocated Worker, and Youth**
- **WIOA Title II Adult Education and Literacy**

- **WIOA Title III Wagner-Peyser**
- **WIOA Title IV Vocational Rehabilitation**
- **Carl Perkins Career Technical Education**
- **Title V Older Americans Act**
- **Native American Programs (Section 166) (Not Available in the Area)**
- **Migrant Seasonal Farmworkers (Section 167)**
- **Veterans**
- **Youth Build (Not Available in the Area)**
- **Trade Adjustment Assistance Act**
- **Community Services Block Grant**
- **Housing & Urban Development**
- **Unemployment Compensation**
- **Monterey County Department of Child Support Services**
- **Second Chance (Not available in the Area)**
- **Temporary Assistance for Needy Families/CalWORKs**

#### **IV. One-Stop System Services**

The goals of the One-Stop delivery system are to:

1. Align goals with the State of California plan(s) applicable to AJCC and partners:
  - a. Foster demand-driven skills attainment
  - b. Enable upward mobility for all people of Monterey County
  - c. Align, coordinate, and integrate programs and services
2. The AJCC and Partner physical locations and facilities enhance the Customer Experience
3. The AJCC and Partners ensure Universal Access, with an emphasis on Individuals with Barriers to Employment
4. The AJCC and Partners actively support the One-Stop System through effective partnerships
5. The AJCC and Partners provide Integrated, Customer-Centered Services
6. The AJCC and Partners are an on-ramp for Skill Development and the attainment of Industry-Recognized Credentials which meet the needs of the targeted local sectors and pathways.
7. The AJCC and Partners actively engage industry and labor and support local sector strategies through an integrated business service strategy that focuses on quality jobs
8. The AJCC and Partners have High-Quality, Well-Informed, Cross-Trained Staffing.
9. The AJCC and Partners achieve business results through Data-Driven Continuous

Improvement

***(See Attachment A: Description of the One-Stop System Partners, the customers served, and the services provided by each AJCC and One-Stop System Partner)***

## **V. Responsibility of AJCC and One-Stop System Partners**

The AJCC and Partners agree to share responsibility for planning, implementing and operating the system in the following manner:

1. The AJCC and partners agree to participate in joint planning, plan development, and modification of activities to accomplish the following:
  - a. Continuous partnership building.
  - b. Continuous planning in response to state and federal requirements.
  - c. Responsiveness to local and economic conditions, including employer needs.
  - d. Adherence to common data collection and reporting needs.
2. Make service(s) applicable to the partner program available to customers through the one-stop delivery system.
3. Participate in the operation of the one-stop system, consistent with the terms of the MOU and requirements of authorized laws.
4. Participate in capacity building and staff development activities to ensure that all partners and staff are adequately cross-trained.

## **VI. Infrastructure Funding Agreement & Other Shared System Costs**

The AJCC and One-Stop System Partners commit to following the use of the “WIOA Sample Infrastructure Funding Agreement and Other Systems Costs Budget” to negotiate the IFA at a future date to be completed no later than July 1, 2025.

**(See Attachment B: Infrastructure Funding Agreement)**

## **VII. Methods for Referring Customers**

The AJCC and One-Stop System Partners commit to mutually implement processes for the referral of customers to services not provided on-site.

The referral process does the following:

1. Ensure that intake and referral processes are customer-centered and provided by staff trained in customer service.
2. Ensure that general information regarding AJCC programs, services, activities and resources shall be made available to all customers as appropriate.
3. Customer referrals are:

- a. made through a paper system with a copy provided to the referred individual,
  - b. tracked by the One Stop Operator and, when possible,
  - c. emailed to the designated contact person at the partner agency, along with a phone call to ensure that the referral has been received. Tracking information is available upon request.
4. Each AJCC and partner provides a direct link or access to other AJCC partner staff that provides meaningful information or service, through colocation, cross training of AJCC staff, or real-time technology (two-way communication and interaction with AJCC partners that results in services needed by the customer). Also, though the use of the **Partner Matrix (see attachment A)**, the AJCC Partner Brochure for customer use, and AJCC Partner One-page Information handouts for staff use (in paper and electronic format).

**(See Attachment C: Universal Referral Form)**

## **VIII. Access for Individuals with Barriers to Employment**

How the AJCC system will ensure access for individuals with barriers to employment:

1. Definition of the term “individuals with barriers to employment.”
  - a. Displaced homemakers
  - b. Low-income individuals
  - c. Indians, Alaska Natives, and Native Hawaiians, as such terms are defined in WIOA section 166
  - d. Individuals with disabilities, including youth who are individuals with disabilities
  - e. Older individuals
  - f. Ex-offenders/Justice Involved
  - g. Homeless individuals (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e–2(6)), or homeless children and youths (as defined in section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a (2))
  - h. Youth who are in or have aged out of the foster care system
  - i. Individuals who are English language learners, individuals who have low levels of literacy, and individuals facing substantial cultural barriers
  - j. Eligible migrant and seasonal farmworkers, as defined in WIOA section 167(i)
  - k. Individuals within 2 years of exhausting lifetime eligibility under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.)
  - l. Single parents (including single, pregnant women)
  - m. Long-term unemployed individuals
  - n. Such other groups as the Governor determines to have barriers to employment.
2. Commitment to offer priority of services for Veterans to recipients of public assistance, other low-

income individuals, or individuals who are basic skills deficient when providing individualized career services and training services with WIOA adult funds.

- a. With respect to funds allocated to a local area for adult employment and training activities, priority shall be given to recipients of public assistance and other low-income individuals, and individuals who are basic skills deficient for receipt of WIOA career and training services. Local WDBs may establish additional priority groups for priority of service.
- b. WIOA provides for a workforce system that is universally accessible and customer centered, and for training that is job driven. Per the Workforce Innovation and Opportunity Act, Final Rule, effective October 18, 2016, the priority requirements described in this policy do not necessarily mean that only the recipients of public assistance and other low-income individuals can receive WIOA adult funded career and training services.
- c. Therefore, MCWDB stipulates that WIOA Program staff will also serve other eligible individuals who are not recipients of public assistance, other low-income individuals, or basic skills deficient individuals after first serving those who meet the established priority selection criteria.
- d. MCWDB's WIOA Adult program is statutorily required to provide priority to individuals described below in section (i. through iii.) MCWDB's policy requires that individuals described in (i. through iv.) are served in the following order:
  - i. Veterans and eligible spouses who are also recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient.
  - ii. Individuals receiving public assistance, other low-income individuals, or individuals who are basic skills deficient.
  - iii. Veterans and eligible spouses who are not included in WIOA's priority groups.
  - iv. Individuals with family income under 250% of the Lower Living Standard Income Level (LLSIL) and for whom it is determined that the individual is in need of and can benefit from services. Long-term unemployed individuals with a barrier to employment may be enrolled under this priority. Employed individuals enrolled under this priority must have a barrier to self-sufficient employment.

Priority of service status is established at the time of eligibility determination and does not change during the period of participation. Priority of Service does not apply to the WIOA Dislocated Worker program.

3. All parties to this MOU will ensure that their policies, procedures, programs, and services are in compliance with the Americans with Disabilities Act of 1990 and its amendments, in order to provide equal access to all customers with disabilities.

***(See Attachment D: "AJCC One-Stop system map" - identifies the location of every comprehensive, affiliate, and specialized AJCC within the Local Area.)***

## **IX. Shared Technology and System Security**

Commitment to share data and technology as well to ensure that all data and systems are secure.

1. WIOA emphasizes technology as a critical tool for making all aspects of information exchange



possible, including client tracking, common case management, reporting, and data collection. To support the use of these tools, each AJCC One-Stop System Partner agrees to the following:

- a. Comply with the applicable provisions of WIOA, Welfare and Institutions Code, California Education Code, Rehabilitation Act, and any other relevant statutes or requirements.
- b. The principles of common reporting and shared information through electronic mechanisms, including shared technology.
- c. Commit to share information to the greatest extent allowable under their governing legislation and confidentiality requirements.
- d. Maintain all records of the AJCC customers or partners (e.g., applications, eligibility and referral records, or any other individual records related to services provided under this MOU) in the strictest confidence and use them solely for purposes directly related to such services.
- e. Develop technological enhancements that allow interfaces of common information needs, as appropriate.
- f. Understand that system security provisions shall be agreed upon by all partners.

## **X. Confidentiality**

1. The AJCC One-Stop System Partner agrees to comply with the provisions of WIOA as well as the applicable sections of the Welfare and Institutions Code, the California Education Code, the Rehabilitation Act, and any other relevant statute or requirement to assure the following:
  - a. All applications and individual records related to services provided under this MOU, including eligibility for services and enrollment and referral, shall be confidential and shall not be open to examination for any purpose not directly connected with the delivery of such services.
  - b. No person will publish, disclose, use, or permit, cause to be published, disclosed or used, any confidential information pertaining to AJCC applicants, participants, or customers overall unless a specific release is voluntarily signed by the participant or customer.
  - c. The AJCC partner agrees to abide by the current confidentiality provisions of the respective statutes to which AJCC operators and other AJCC partners must adhere and shall share information necessary for the administration of the program as allowed under law and regulation.
  - d. The AJCC partner, therefore, agrees to share client information necessary for the provision of services such as assessment, universal intake, program or training referral, job development or placement activities, and other services as needed for employment or program support purposes.
  - e. Client information shall be shared solely for the purpose of enrollment, referral or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of the other parties.

## **XI. Non-Discrimination and Equal Opportunity**

1. The AJCC One-Stop System partner shall not unlawfully discriminate, harass or allow harassment against any employee, applicant for employment or AJCC applicant due to gender, race, color, ancestry, religion, national origin, veteran status, physical disability, mental disability, medical condition(s), age, sexual orientation or marital status. The AJCC partner agrees to comply with the provisions of the Fair Employment and Housing Act (Government Code Section 12990), in accordance with the WIOA non-discrimination and equal opportunity provisions cited in Title VI of the Civil Rights Act of 1964, Section 188 of the WIOA, and California Government Code § 12920, 12940, and 12949, and related, applicable regulations. This also applies to beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA financially assisted program or activity. In addition, sexual harassment is against the law and is grounds for filing a discrimination complaint.
2. The AJCC One-Stop System partner will assure compliance with the Americans with Disabilities Act of 1990 and its amendments, which prohibits discrimination on the basis of disability, as well as other applicable regulations and guidelines issued pursuant to the Americans with Disabilities Act.

## **XII. Grievances and Complaints Procedure**

1. All AJCC One-Stop System partners agree to establish and maintain a procedure for grievance and complaints as outlined in WIOA. The process for handling grievances and complaints is applicable to both customers and partners. These procedures will allow the customer or entity filing the complaint to exhaust every administrative level to receive a fair and complete hearing and resolution of their grievance. The partner further agrees to communicate openly and directly to resolve any problems or disputes related to the provision of services in a cooperative manner and at the lowest level of intervention possible.
2. All AJCC / One-Stop partners shall comply with the Monterey County Workforce Development Board's Policy #2019-01 – the Grievance and Complaint Policy and attachments located online at: [Accessibility | Monterey County Workforce Development Board \(montereycountywdb.org\)](https://montereycountywdb.org).

## **XIII. Americans with Disabilities Act and Amendments Compliance**

All AJCC / One-Stop partners agree to ensure that the policies and procedures as well as the programs and services provided at the AJCC / One-Stop are in compliance with the Americans with Disabilities Act and its amendments. Additionally, partners agree to fully comply with the provisions of WIOA, Title VI and Title VII of the Civil Rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, 29 CRF Part 37, and all other regulations implementing the aforementioned laws.

## **XIV. Effective Dates and Term of MOU**

1. This MOU shall be effective on July 1, 2025. The term of this MOU shall be three years, from July 1, 2025, through June 30, 2028.

2. This MOU shall be binding upon each party hereto upon execution by such party. The MOU will be reviewed not less than once every three years to identify any substantial changes that have occurred and amend and extend as appropriate.

## **XV. Modifications, Revisions, Amendments**

1. This MOU constitutes the entire agreement between the parties and no oral understanding not incorporated herein shall be binding on any of the parties hereto. This MOU may be modified, altered, or revised, as necessary, by mutual consent of the parties, by the issuance of a written amendment, signed and dated by the parties.
2. All parties agree that amendments affecting one partner only, or specific partners only, need only be signed by authorized representatives of the Monterey County WDB, the CEO, and the affected partner(s). Amendments that will affect the responsibilities of all parties require the signatures of all parties. All amendments will involve the following process:

The party seeking an amendment will submit a written request to the Monterey County WDB that includes:

- I. The requesting party's name
  - II. The reason(s) for the amendment request
  - III. Each section of this MOU that will require revision
  - IV. The desired date for the amendment to be effective
  - V. The signature of the requesting party's authorized representative.
3. If the request is approved, the Monterey County WDB will notify the remaining parties of the intent to amend and will provide each remaining party thirty (30) days from the date of the notice (unless another timeframe is specified in the notice) to review the anticipated amendment and to submit a response to the Monterey County WDB. Failure by a party to respond within the prescribed timeframe will be deemed that party's approval of the proposed amendment.
  4. In the event that a remaining party has questions and/or concerns regarding the proposed amendment, the party must list its questions and/or concerns in writing and submit the list to the Monterey County WDB within the specified timeframe.
  5. Monterey County WDB will review the listed questions and/or concerns and will issue a response within fifteen (15) days of receipt of the list. If the Monterey County WDB deems it necessary, the listed questions and/or concerns will be sent to all other parties and/or a meeting with all parties will be scheduled to discuss the proposed changes and to achieve consensus on a final amendment draft.
  6. The final, approved amendment draft will be signed by authorized representatives of the affected partners and then submitted to the Monterey County WDB for the final signature. Monterey County WDB will distribute copies of the fully executed amendment to all parties.
  7. This writing constitutes the entire agreement pertinent to Phase I of the MOU process

among the parties with respect to each party's role and responsibility in the AJCC / One-Stop delivery system. All parties agree that any amendments to any applicable laws or regulations cited herein will result in the correlative modification of this MOU without necessitating a formal, written amendment.

8. All parties agree to communicate details of any amendment to their respective staff members whose responsibilities may be impacted by changes and further agree to ensure that their respective staff members are referencing or utilizing the most current version of the MOU and attachments in the performance of responsibilities under this MOU.
9. Amendments that will require the signatures of all parties must be executed no later than ninety (90) days prior to the end of the MOU period, and amendments that require only the signatures of the LWDB, the CEO, and the affected parties must be executed no later than 45 days from the end of each current program year.

#### **XVI. Termination**

1. This MOU will remain in effect until the end date specified in Section XIV.
2. The parties understand that implementation of the AJCC / One-Stop delivery system is dependent on the good faith effort of every partner to work together to improve services to the community.

#### **XVII. Administrative and Operations Management**

1. License for Use – During the term of this MOU, all partners to this MOU shall have a license to use all the space of the AJCCs for the sole purpose of conducting acceptable AJCC services as out lined herein.
2. Supervision/Day to Day Operations –
  - a. The day-to-day supervision of staff assigned to the AJCCs will be the responsibility of the site supervisor(s). The original employer of staff assigned to the AJCCs will continue to set the priorities of its staff. Any change in work assignments or any problems at the worksite will be handled by the site supervisor(s) and the management of the original employer.
  - b. The office hours for the staff at the AJCCs will be established by the site supervisor(s) and the primary employer. The office hours will be posted at all locations. All staff will comply with the holiday schedule of their primary employer or Monterey County Workforce Development Board, and the primary employer will provide a copy of their holiday schedule to the operator and host agency at the beginning of each fiscal year.
  - c. Each AJCC One-Stop System partner is responsible for the discipline of its own employee(s), where warranted. Disciplinary actions may result in removal of co-located staff from the AJCCs, and each party will take appropriate action.
3. Each party shall be solely liable and responsible for providing to, or on behalf of, its employee(s), all legally required employee benefits. In addition, each party shall be solely responsive and save all other parties harmless from all matters relating to payment of each party's employee(s), including compliance with social security withholding, workers' compensation, and all other regulations

governing such matters. In addition, they shall comply with the following:

- a. Evidence of Coverage: Prior to commencement of this Agreement, each party to this Agreement shall provide a "Certificate of Insurance" or proof of self-insurance certifying that coverage as required herein has been obtained. Individual endorsements executed by the insurance carrier shall accompany the certificate. In addition, each party upon request shall provide a certified copy of the policy or policies.
- b. This verification of coverage shall be sent to Monterey County's Contracts/Purchasing Department, unless otherwise directed. Parties to this Agreement shall not receive a "Notice to Proceed" with the work under this Agreement until it has obtained all insurance required and the County has approved such insurance. This approval of insurance shall neither relieve nor decrease the liability of the party.
- c. Qualifying Insurers: All coverages, except surety, shall be issued by companies which hold a current policy holder's alphabetic and financial size category rating of not less than A- VII, according to the current Best's Key Rating Guide or a company of equal financial stability that is approved by the County's Purchasing Manager.
- d. Insurance Coverage Requirements: Without limiting a party's duty to indemnify, each party shall maintain in effect throughout the term of this Agreement a policy or policies of insurance with the following minimum limits of liability:
  - i. Commercial general liability insurance, including but not limited to premises and operations, including coverage for Bodily Injury and Property Damage, Personal Injury, Contractual Liability, Broad form Property Damage, Independent Contractors, Products and Completed Operations, with a combined single limit for Bodily Injury and Property Damage of not less than \$1,000,000 per occurrence.
  - ii. Workers' Compensation Insurance, if a party employs others in the performance of this Agreement, in accordance with California Labor Code section 3700 and with Employer's Liability limits not less than \$1,000,000 each person, \$1,000,000 each accident and \$1,000,000 each disease.
- e. Dispute Resolution – The parties agree to try to resolve policy or practice disputes at the lowest level, starting with the site supervisor(s) and staff. If issues cannot be resolved at this level, they shall be referred to the management staff of the respective staff employer and the operator, for discussion and resolution.
- f. Press Releases and Communications – All parties shall be included when communicating with the press, television, radio or any other form of media regarding its duties or performance under this MOU. Participation of each party in press/media presentations will be determined by each party's public relations policies. Unless otherwise directed by the other parties, in all communications, each party shall make specific reference to all other parties.

The parties agree to utilize the AJCC logo developed by the State of California and the Local Board on buildings identified for AJCC usage when providing services or performing its duties pursuant to this MOU. This includes use of the AJCC logo on letterhead, envelopes, business cards, any written correspondence and fax transmittals pertaining to implementation of the terms of this MOU.

- g. Hold Harmless/Indemnification/Liability – *In accordance with provisions of Section 895.4 of*

*the California Government Code, each party hereby agrees to indemnify, defend and hold harmless all other parties identified in this MOU from and against any and all claims, demands, damages and costs arising out of or resulting from any acts or omissions which arise from the performance of the obligations by such indemnifying party pursuant to this MOU. In addition, except for Departments of the State of California which cannot provide for indemnification of court costs and attorney's fees under the indemnification policy of the State of California, all other parties to this MOU agree to indemnify, defend and hold harmless each other from and against all court costs and attorney's fees arising out of or resulting from any acts or omissions which arise from the performance of the obligations by such indemnifying party pursuant to this MOU. It is understood and agreed that all indemnity provided herein shall survive the termination of this MOU.*

### **XVIII. Signature Pages**

All partners, regardless of collocation status, must sign the MOU. By signing below, all parties agree to the terms prescribed in this MOU, including the attached IFA and other system costs budget.

#### **Authority and Signature Page**

*By signing below, each party agreed to the terms prescribed herein. Each individual signing this MOU warrants that he/she is authorized to execute this MOU on behalf of the entity that he/she represents. Each individual signing this MOU warrants that he/she is empowered to legally bind the entity he/she represents to the terms of this MOU.*

<p><i>Monterey County Board of Supervisors, Chief Elected Official</i></p> <p>Chris Lopez, Supervisor District 3</p>	<p><i>Monterey County Workforce Development Board (WDB) Chairperson</i></p> <p>Erik Cushman, Publisher, Monterey County Weekly</p>
<p>Printed Name &amp; Title</p>	<p>Printed Name &amp; Title</p>
<p>Signature _____ Date _____</p>	<p>Signature _____ Date _____</p>
<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education Monterey Peninsula College</i></p> <p>John Skellenger, Dean of Instruction</p>	<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education Hartnell College</i></p> <p>Michael Gutierrez, Superintendent/President</p>
<p>Printed Name &amp; Title</p>	<p>Printed Name &amp; Title</p>
<p>Signature _____ Date _____</p>	<p>Signature _____ Date _____</p>

<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA) and Carl Perkins Career Technical Education</i> <i>Pacific Grove Adult Education</i></p> <p>Barbara Martinez Director, Principal</p> <hr/> <p>Printed Name &amp; Title</p>	<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA) and Carl Perkins Career Technical Education</i> <i>Monterey Adult School</i></p> <p>Beth Wodecki, Principal</p> <hr/> <p>Printed Name &amp; Title</p>
<p>Signature _____ Date _____</p>	<p>Signature _____ Date _____</p>
<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA) and Carl Perkins Career Technical Education</i> <i>Mission Trails Regional Occupational Program</i></p> <p>Rob Appel, Director</p> <hr/> <p>Printed Name and Title</p>	<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA) and Carl Perkins Career Technical Education</i> <i>Salinas Adult School</i></p> <p>_____, Director</p> <hr/> <p>Printed Name and Title</p>
<p>Signature _____ Date _____</p>	<p>Signature _____ Date _____</p>
<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA) and Carl Perkins Career Technical Education</i> <i>Soledad Adult School</i></p> <p>Jeff Lopez Director, Principal</p> <hr/> <p>Printed Name and Title</p>	<p><b>WIOA Title III</b>  <i>Wagner-Peyser, Veterans, Trade Adjustment Assistance Act and Unemployment Compensation</i> <i>Employment Development Department (EDD)</i></p> <p>Cesar A. Valladares, Deputy Division Chief</p> <hr/> <p>Printed Name and Title</p>
<p>Signature _____ Date _____</p>	<p>Signature _____ Date _____</p>
<p><b>WIOA Title V Older American Act</b></p> <hr/> <p>Printed Name and Title</p>	<p><b>WIOA Title IV</b>  <i>Vocational Rehabilitation</i> <i>Department of Vocation Rehabilitation (DOR)</i></p> <p>Justin McIntire, District Administrator, Department of Rehabilitation</p> <hr/> <p>Printed Name and Title</p>
<p>Signature _____ Date _____</p>	<p>Signature _____ Date _____</p>

<p><b>CalWORKS / Employment Services</b>  <i>Monterey County Department of Social Services</i></p>  <p>Roderick W. Franks, Director</p> <hr/> <p>Printed Name and Title</p>  <table border="1" data-bbox="151 611 813 646"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date	<p><b>WIOA Title V</b>  <i>Older American Act Senior Community Service  Employment Program  National Association for Hispanic Elderly</i></p>  <p>Sr. Carmela G. Lacayo, President/CEO</p> <hr/> <p>Printed Name and Title</p>  <table border="1" data-bbox="857 611 1520 646"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date
Signature	Date				
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<p><b>WIOA Title III</b></p>   <hr/> <p>Printed Name and Title</p>  <table border="1" data-bbox="151 1016 813 1052"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date	<p><b>WIOA Title IV</b>  <i>Vocational Rehabilitation  Department of Vocation Rehabilitation (DOR)</i></p> <p>Justin McIntire, District Administrator District  Department of Rehabilitation</p> <hr/> <p>Printed Name and Title</p>  <table border="1" data-bbox="857 1016 1520 1052"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date
Signature	Date				
Signature	Date				
<p><b>CalWORKS / Employment Services</b>  <i>Monterey County Department of Social Services</i></p>  <p>Roderick W. Franks, Director</p> <hr/> <p>Printed Name and Title</p>  <table border="1" data-bbox="151 1451 813 1486"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date	<p><b>WIOA Title V</b>  <i>Older American Act Senior Community Service  Employment Program  National Association for Hispanic Elderly</i></p>  <p>Sr. Carmela G. Lacayo, President/CEO</p> <hr/> <p>Printed Name and Title</p>  <table border="1" data-bbox="857 1451 1520 1486"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date
Signature	Date				
Signature	Date				
<p><b>Community Services Block Grant</b>  <i>Monterey County Community Action Partnership</i></p>  <p>Lauren C. Suwansupa, MSW, LCSW  CAP Director, LCSW63551</p> <hr/> <p>Printed Name and Title</p>  <table border="1" data-bbox="151 1852 813 1887"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date	<p><b>Job Corps</b>  <i>Job Corps</i></p>  <p>Davina Wong, Center Director</p> <hr/> <p>Printed Name and Title</p>  <table border="1" data-bbox="857 1852 1520 1887"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date
Signature	Date				
Signature	Date				



	Signature _____ Date _____
<b>Housing &amp; Urban Development</b> <i>Monterey County Housing Authority</i>	<b>Monterey County Department of Child Support Services</b>  <i>Kristina Cardenas, Management Analyst II</i>
_____ Printed Name and Title	_____ Printed Name and Title
Signature _____ Date _____	Signature _____ Date _____
<b>Native American Programs</b> <i>Southern California American Indian Resource Center (SCAIR), Inc.</i>	<b>Migrant Seasonal Farmworkers</b> <i>Center for Employment Training</i>
<i>Wanda Michaelis, Executive Director</i>	<i>Rocio Gonzalez, Director</i>
_____ Printed Name and Title	_____ Printed Name and Title
Signature _____ Date _____	Signature _____ Date _____

**XIX. Attachments**

Attachments A1 and A2: Parties to the MOU/Partner Matrix - Description of the One-Stop System Partners, the customers served, and the services provided by each AJCC and One-Stop System partner

Attachments B1 and B2: Universal Referral Form

Attachment C: AJCC One-Stop system map - identifies the location of every comprehensive, affiliate, and specialized AJCC within the Local Area

Attachment D: Directive to Formulate the IFA and Other Shared System Costs

**ATTACHMENT A1****WIOA Partner MOU****AJCC Partner Matrix**

WIOA	Provider	Type	Basic Career - Self Service	Basic Career - Staff-Assisted	Individual Career Services	Career Service	Follow-up	Training	Supportive Services
Title I Adult, Dislocated Worker, and Youth	Equus Workforce Solutions	Core	X	X	X	X	X	X	X
Title I Youth	Turning Point	Core	X	X	X	X	X	X	X
Title II Adult Education and Literacy	North Monterey County Adult Ed.	Core				X		X	
Title II Adult Education and Literacy	Monterey County Office of Education (MCOE) Adult Ed.	Core				X		X	
Title II Adult Education and Literacy	Gonzales Adult Education	Core				X		X	
Title II Adult Education and Literacy	Monterey Adult Education	Core				X		X	
Title II Adult Education and Literacy	Pacific Grove Adult Education	Core				X		X	
Title II Adult Education and Literacy	Salinas Adult Education	Core				X		X	
Title II Adult Education and Literacy	Soledad Adult Education	Core				X		X	
Carl Perkins Career Technical Education	Hartnell Community College	Core				X		X	
Carl Perkins Career Technical Education	Monterey Peninsula Community College	Core				X		X	
Title III Wagner-Peyser, Veterans, Trade Adjustment Assistance Act, Unemployment Compensation	Employment Development Department	Core	X	X	X	X	X	X	
Title IV Vocational Rehabilitation	Department of Rehabilitation	Core				X		X	X

<b>ATTACHMENT A2</b>  <b>WIOA</b>	<b>Provider</b>	<b>Type</b>	<b>Basic Career - Self Service</b>	<b>Basic Career - Staff- Assisted</b>	<b>Individual Career Services</b>	<b>Career Service</b>	<b>Follow- up</b>	<b>Training</b>	<b>Supportive Services</b>
Title V Older Americans Act	National Association for Hispanic Elderly (NAHE)	Mandated			X	X			
Job Corps	Job Corps San Jose	Mandated			X	X		X	X
Native American Programs (Section 166)	Not in Local Area								
Migrant Seasonal Farmworkers (Section 167)	Center for Employment Training	Mandated				X		X	X
Youth Build	Not in Local Area								
Community Services Block Grant	Community Action Partnership	Mandated				X		X	X
Housing & Urban Development	Housing Authority of Monterey County	Mandated				X		X	X
Second Chance	Not in Local Area								
Temporary Assistance for Needy Families/CalWORKs	CalWORKs Employment and Training Services (DSS)	Mandated		X	X	X		X	X
State/Local Plan Modification	CalFresh - Department of Social Service (DSS)	Partner							X
Partnership Agreement	Monterey County Department of Child Support Services	Partner							X



REV 05/21/2025

**WIOA PARTNER REFERRAL FORM**

**DATE:**                      **REFERRAL GROUP:**              **Adult** (18 and older)              **Youth** (18 to 24)  
    **Displaced Workers** – Separated from Employment/Service or Major Life Changes

**CUSTOMER INFORMATION:**

Name:

City:                      DOB: (mm/dd)

Phone:

Email:

**REFERRED BY: Organization Name Here**

Name:

Phone:

Email:

**REASON FOR REFERRAL:****COMMUNITY BASED ORGANIZATION:**

Name:

Address:

Phone:

Email:


**NOTES:**

**This a DCSS client. You must sign this referral form and make a copy for them to return to DCSS. Thank you**

Signature: \_\_\_\_\_

**Your consent to share personal information is entirely voluntary and you may withdraw your consent at any time.**

**Su consentimiento para compartir información personal es completamente voluntario y puede retirarlo en cualquier momento.**

<div>ATTACHMENT B2</div> <div>  </div>		
<input type="checkbox"/> <b>Adult School – Gonzales</b>	<input type="checkbox"/> <b>Adult School – Monterey</b>	<input type="checkbox"/> <b>Adult School – Pacific Grove</b>
650 Elko Street, Gonzales (831) 675-1081 <a href="https://ae.gonzalesusd.net/">https://ae.gonzalesusd.net/</a>	1295 La Salle Ave, Seaside (831) 392-3565 <a href="https://mas.mpusd.net/">https://mas.mpusd.net/</a>	1025 Lighthouse Ave, Pacific Grove (831) 646-6580 <a href="https://pgadulthood.pgusd.org/">https://pgadulthood.pgusd.org/</a>
<input type="checkbox"/> <b>Adult School – Salinas</b>	<input type="checkbox"/> <b>Adult School – Soledad</b>	<input type="checkbox"/> <b>Southern California American Indian Resource Center (SCAIR), Inc.</b>
20 Sherwood Pl, Salinas (831) 287-9511 <a href="https://www.salinasuhd.org/sas">https://www.salinasuhd.org/sas</a>	690 Main Street, Soledad (831) 678-6300 <a href="https://svaec.org">https://svaec.org</a>	Phone: (805) 765-6243 <a href="https://www.scairinc.org/">https://www.scairinc.org/</a>
<input type="checkbox"/> <b>AJCC Marina – Adult, DW</b>	<input type="checkbox"/> <b>AJCC Salinas – Adult &amp; Dislocated Worker Programs / Youth</b>	<input type="checkbox"/> <b>AJCC Seaside – Youth North - Equus</b>
289 12 <sup>th</sup> Street Room 402, Marina (831) 796-3335	344 Salinas Street STE#201, Salinas (831) 796-3335	1295 La Salle Ave., #14 Seaside (831) 769-3335
<input type="checkbox"/> <b>Center for Employment Training, Salinas/Soledad (CET) Farm Worker Programs</b>	<input type="checkbox"/> <b>Monterey County Workforce Development Board (Business Services and Grants) (MCWDB)</b>	<input type="checkbox"/> <b>Youth Services South – Turning Point</b>
24 E. Alvin Drive, Salinas (831) 424-0665 930 Los Coches Drive, Soledad (831) 678-0448	344 Salinas Street STE #101, Salinas (831) 796-3387 <a href="http://montereycountywdb.org">montereycountywdb.org</a>	344 Salinas Street Ste #208, Salinas, CA 93901 Salinas (831) 796-3303
<input type="checkbox"/> <b>Community College – Hartnell</b>	<input type="checkbox"/> <b>Community College – MPC</b>	<input type="checkbox"/> <b>Dept. of Rehabilitation (DOR)</b>
411 Central Avenue, Salinas 1752 E. Alisal Street, Salinas CTE - (831) 755-6700 Adult Ed X 6727 Non-Credit/ESL (831) 759-6051	980 Fremont Street, Monterey 289 12 <sup>th</sup> Street, Marina Admissions & Records (831) 646-4002 <a href="https://www.mpc.edu/">https://www.mpc.edu/</a>	928 E. Blanco Rd. Ste. #280, Salinas, CA 93901 (831) 769-8066
<input type="checkbox"/> <b>Dept. of Social Services (DSS) CWES CalWORKS Employment Services</b>	<input type="checkbox"/> <b>Employment Development Department (EDD)</b>	<input type="checkbox"/> <b>Child Support Services</b>
730 La Guardia Street, Salinas 1281 Broadway Ave. Seaside 200 Broadway #62, King City <b>1-800-870-4750</b>	928 E. Blanco Road, Suite 280 Salinas, CA 93901 (831) 464-6286 <a href="http://edd.ca.gov/">http://edd.ca.gov/</a>	752 La Guardia St. Salinas (831) 769-8782 or (866) 901-3212 <a href="http://www.co.monterey.ca.us/government/departments-a-h/child-support-services">www.co.monterey.ca.us/government/departments-a-h/child-support-services</a>
<input type="checkbox"/> <b>Housing Authority of Monterey CO</b>		<input type="checkbox"/> <b>Senior Community Service</b>
123 Rico Street, Salinas (831) 775-5000 TDD (831) 754-2951 <a href="https://hamonterey.org/">https://hamonterey.org/</a>		<b>Employment Program – (ANPPM)</b> 1325 N. Main St., Salinas (831) 287-2350 x 8358
<input type="checkbox"/> <b>Monterey County Office of Education</b>	<input type="checkbox"/> <b>Community Action Partnership</b>	
901 Blanco Cir, Salinas, CA 93901 (831) 783-5285 – Jocelyn Rios <a href="https://www.montereycoe.org/programs-services/alternative-education/schools/">https://www.montereycoe.org/programs-services/alternative-education/schools/</a>	1000 South Main St #301, Salinas (831) 796-1553 <a href="https://www.montereycoe.org/programs-services/alternative-education/schools/">services/community-action-partnership#cap</a>	

I agree to my information being shared and gathered for data tracking and referral purposes only, between all listed local WIOA partners.

Estoy de acuerdo con que mi información sea compartida y recolectada solo para fines de seguimiento y referencia de datos, entre todos los colaboradores locales de WIOA indicados.

\_\_\_\_\_Participant initials/ Iniciales del participante

REV 5/21/2025

**ATTACHMENT C**

WIOA PARTNER MOU

ONE STOP SYSTEM MAP: AJCC LOCATIONS

Type of AJCC	AJCC Location	Phone Number	Hours	Notes
<b>Comprehensive</b>	344 Salinas Street, Suite #203 Salinas, CA 93901	(831) 796-3335	Monday - Thursday 8:00 AM -6:00 PM Friday 8:00 AM– 5:00 PM	Appointments available for weekends and/or extended hours upon request.
<b>Affiliate</b>	MPC Marina Campus 289 12 <sup>th</sup> Street, Room #402 Marina, CA 93933	(831) 597-2858	Monday - Thursday 8:00 AM -5:00 PM	Appointments available for weekends and/or extended hours upon request.
<b>Affiliate</b>	Monterey Adult School 1295 La Salle Ave. #7 Seaside, CA 93955	(831) 708-6484	Monday – Thursday 10:00 AM -7:00 PM Friday 8:00 AM – 5:00 PM	Appointments available for weekends and/or extended hours upon request.

## XX. Signature Page

All partners, regardless of collocation status, must sign the MOU. By signing below, all parties agree to the terms prescribed in this MOU, including the attached IFA and other system costs budget.

### **Authority and Signature Page**

*By signing below, each party agreed to the terms prescribed herein. Each individual signing this MOU warrants that he/she is authorized to execute this MOU on behalf of the entity that he/she represents. Each individual signing this MOU warrants that he/she is empowered to legally bind the entity he/she represents to the terms of this MOU.*

<i>Monterey County Board of Supervisors, Chief Elected Official</i>	<i>Monterey County Workforce Development Board (WDB) Chairperson</i>
Chris Lopez, Supervisor District 3	Erik Cushman, Publisher, Monterey County Weekly
Printed Name & Title	Printed Name & Title
Signature _____ Date _____	Signature _____ Date _____
<b>WIOA Title II</b> <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education <i>Monterey Peninsula College</i></i>	<b>WIOA Title II</b> <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education <i>Hartnell College</i></i>
John Skellenger, Dean of Instruction	, Dean- Academic Affairs
Printed Name & Title	Printed Name & Title
Signature _____ Date _____	Signature _____ Date _____
<b>WIOA Title II</b> <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education <i>Pacific Grove Adult Education</i></i>	<b>WIOA Title II</b> <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education <i>Monterey Adult School</i></i>
Barbara Martinez Director, Principal	Beth Wodecki, Principal
Printed Name & Title	Printed Name & Title
Signature _____ Date _____	Signature _____ Date _____



<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education</i>  <i>Mission Trails Regional Occupational Program</i></p> <p><u>Rob Appel, Director</u></p> <p>Printed Name and Title</p> <p>Signature _____ Date _____</p>	<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education</i>  <i>Salinas Adult School</i></p> <p><u>, Director</u></p> <p>Printed Name and Title</p> <p>Signature _____ Date _____</p>
<p><b>WIOA Title II</b>  <i>Adult Education and Family Literacy Act {AEFLA} and Carl Perkins Career Technical Education</i>  <i>Soledad Adult School</i></p> <p><u>Jeff Lopez Director, Principal</u></p> <p>Printed Name and Title</p> <p>Signature _____ Date _____</p>	<p><b>WIOA Title III</b>  <i>Wagner-Peyser, Veterans, Trade Adjustment Assistance Act and Unemployment Compensation</i>  <i>Employment Development Department (EDD)</i></p> <p><u>Cesar A. Valladares, Deputy Division Chief</u></p> <p>Printed Name and Title</p> <p>Signature _____ Date _____</p>
<p><b>WIOA Title V Older American Act</b></p> <p>_____</p> <p>Printed Name and Title</p> <p>Signature _____ Date _____</p>	<p><b>WIOA Title IV</b>  <i>Vocational Rehabilitation</i>  <i>Department of Vocation Rehabilitation (DOR)</i></p> <p><u>Justin McIntire, District Administrator District Department of Rehabilitation</u></p> <p>Printed Name and Title</p> <p>Signature _____ Date _____</p>
<p><b>CalWORKS / Employment Services</b>  <i>Monterey County Department of Social Services</i></p> <p><u>Roderick W. Franks, Director</u></p> <p>Printed Name and Title</p> <p>Signature _____ Date _____</p>	<p><b>WIOA Title V</b>  <i>Older American Act Senior Community Service Employment Program</i>  <i>National Association for Hispanic Elderly</i></p> <p><u>Sr. Carmela G. Lacayo, President/CEO</u></p> <p>Printed Name and Title</p> <p>Signature _____ Date _____</p>

<b>WIOA Title III</b>	<b>WIOA Title IV</b> <i>Vocational Rehabilitation</i> <i>Department of Vocation Rehabilitation (DOR)</i>  Justin McIntire, District Administrator District Department of Rehabilitation
Printed Name and Title	Printed Name and Title
<div>Signature</div> <div>Date</div>	<div>Signature</div> <div>Date</div>
<b>CalWORKS / Employment Services</b> <i>Monterey County Department of Social Services</i>   Roderick W. Franks, Director	<b>WIOA Title V</b> <i>Older American Act Senior Community Service  Employment Program</i> <i>National Association for Hispanic Elderly</i>   Sr. Carmela G. Lacayo, President/CEO
Printed Name and Title	Printed Name and Title
<div>Signature</div> <div>Date</div>	<div>Signature</div> <div>Date</div>
<b>Community Services Block Grant</b> <i>Monterey County Community Action Partnership</i>   Lauren C. Suwansupa, MSW, LCSW CAP Director, LCSW63551	<b>Job Corps</b> <i>Job Corps</i>   Davina Wong, Center Director
Printed Name and Title	Printed Name and Title
<div>Signature</div> <div>Date</div>	<div>Signature</div> <div>Date</div>
<b>Housing &amp; Urban Development</b> <i>Monterey County Housing Authority</i>   	<b>Monterey County Department of Child Support Services</b>   Kristina Cardenas, Management Analyst II
Printed Name and Title	Printed Name and Title
<div>Signature</div> <div>Date</div>	<div>Signature</div> <div>Date</div>

<b>Native American Programs</b> <i>Southern California American Indian Resource Center (SCAIR), Inc.</i>	<b>Migrant Seasonal Farmworkers</b> <i>Center for Employment Training</i>
Wanda Michaelis, Executive Director	Rocio Gonzalez, Director
Printed Name and Title	Printed Name and Title
SignatureDate	SignatureDate

**Attachment D**

**Monterey County  
Workforce Innovation and Opportunity Act (WIOA) Infrastructure  
Funding Agreement and Other System Costs Budget**

**Table of Contents**

Process and Development	Page 3
Sharing Infrastructure Costs	Page 8
Chosen Options: Each AJCC / Network of AJCCs	Page 8
AJCC(s) / Co-located Partners	Page 9
AJCC Infrastructure Budget	Page 10
Infrastructure Cost Allocation Methodology	Page 13
Explanation of Initial Proportionate Share of Infrastructure Cost	Page 14
Third-Party In-Kind Contributions to Support the AJCC as a Whole	Page 14
Initial Proportionate Share Allocated to Each Co-located Partner	Page 15
Signature Page: Co-located Partners Sharing AJCC Infrastructure Costs	Page 16
Signature Page: Non-co-located Partners Sharing AJCC Infrastructure Costs When Benefits Data are Available	Page 17

**Sharing Other One-Stop System Costs**

When sufficient data is available from all non-co-located partners, it is anticipated that, as part of the MOU IFA development process, a determination will be made during the negotiation of the IFA regarding each partner's proportionate share of other one-stop system costs, and a complete and updated list of career services provided by AJCC partners and a Consolidated Budget for the delivery of applicable career services will be developed.

**I. Required Process and Development**

*Local Workforce Development Area:* Monterey County Workforce Development Board (MCWDB).

1. The period of time this agreement is effective:

The Infrastructure Funding Agreement shall be effective on July 1, 2025. The term of this IFA shall be three years, from July 1, 2025, through June 30, 2028.

2. Identification of all AJCC partners, Chief Elected Officials (CEO), and Local Boards participating in the infrastructure and other system costs funding agreements.
- a. Chief Elected Official: Monterey County Board of Supervisors, as the Chief Elected Official body for the Workforce Innovation and Opportunity Act (WIOA) Title I.
  - b. Local Board: Monterey County Workforce Development Board; and
  - c. AJCC/One-Stop partners participating in the *Infrastructure Funding Agreement* (IFA), as set forth in the table below:

	Partner Program	Partner Organization
Partner 1	WIOA Title I Adult, Dislocated Worker and Youth	Monterey County Workforce Development Board / Equus Workforce Solutions

- d. AJCC/One-Stop partners participating in the *Shared Other System Costs Agreement*, including "applicable career services" are as follows:

	Partner Program	Partner Organization
Partner 1	WIOA Title I Adult, Dislocated Worker and Youth	Monterey County Workforce Development Board - Equus Workforce Solutions
Partner 2	WIOA Title III Wagner-Peyser, Jobs for Veterans State Grant (JVSG), Trade Adjustment Assistance Act, and Unemployment Insurance	State of California Employment Development Department (EDD)
Partner 3	WIOA Title IV Department of Vocational Rehabilitation	State of California Department of Rehabilitation (DOR)
Partner 4	WIOA Title Adult Ed & Literacy	North Monterey County Adult Education
Partner 5	WIOA Title Adult Ed & Literacy	Monterey County Office of Education (MCOE) Adult Education
Partner 6	WIOA Title Adult Ed & Literacy	Gonzales Adult School
Partner 7	WIOA Title Adult Ed & Literacy	Monterey Adult School
Partner 8	WIOA Title Adult Ed & Literacy	Pacific Grove Adult School
Partner 9	WIOA Title Adult Ed & Literacy	Salinas Adult School
Partner 10	WIOA Title Adult Ed & Literacy	Soledad Adult School

Partner 11	WIOA Title Adult Ed & Literacy/ Carl Perkins CTE	Hartnell College
Partner 12	WIOA Title II Adult Ed & Literacy/ Carl Perkins CTE	Monterey Peninsula College
Partner 13	WIOA Title V Older Americans Act - Senior Community Service Employment Program	National Association for Hispanic Elderly (NAHE)
Partner 14	Community Services Block Grant	Monterey County Community Action Partnership
Partner 15	Housing & Urban Development	Housing Authority of the County of Monterey
Partner 16	Migrant & Seasonal Farmworkers	Center for Employment Training (CET)
Partner 17	TANF / CalWORKs	County of Monterey Social Services

- e. Steps the Local Board, CEO, and AJCC partners took to reach consensus and/or an assurance that the Local Area followed guidance for the state infrastructure funding mechanism:

*The AJCC and One-Stop System Partners committed to use the “WIOA Sample Infrastructure Funding Agreement and Other Systems Costs Budget” to complete the IFA and to negotiate a new IFA at a future date, to be completed no later than December 31, 2025.*

- f. A description of the process to be used among partners to resolve issues during the MOU duration period when consensus cannot be reached:

*The AJCC/One-Stop partners agree to communicate openly and directly to resolve any problems or disputes related to negotiating cost allocations and the fair and equitable contribution to the costs of maintaining a comprehensive and affiliate AJCC/One-Stop delivery system in the community. The partners*



*agree to work in a cooperative manner and to resolve any disputes at the lowest level of intervention possible. If disputes cannot be resolved at the AJCC/One-Stop partner level, the issue will be brought to the attention of the One-Stop Operator and all parties to this MOU regarding the conflict. If any dispute cannot be resolved by the One-Stop Operator, it shall be forwarded to the Monterey County WDB Executive Director to place the dispute on the agenda of a special meeting of the Monterey County WDB Executive Committee. The Executive Committee shall attempt to mediate and resolve the dispute. Disputes shall be resolved by a majority consent of the Executive Committee members present. Thereafter, the Monterey County WDB Executive Director will contact the appropriate parties to verify that all agree with the proposed resolution.*

- g. A description of the periodic modification and review process that will be used to ensure all AJCC partners continue to contribute their fair and equitable share of infrastructure and other system costs, including the identification of who will fulfill this responsibility. This must include a reconciliation schedule. (Who, What, When, How):*

*The Monterey County WDB's finance manager was designated by the partners to be the person responsible for convening the partners of the MOU Phase II to conduct the periodic modification and review process of the infrastructure funding agreement and sharing of other system costs. The WDB finance manager plans to review and reconcile the infrastructure and other system cost budgets periodically throughout the program year against actual costs incurred. Upon the closeout of each fiscal year (June 30), a report with proposed modifications will be made available by the WDB finance manager to the mandated partners to ensure that partner contributions are proportionate to their use of the AJCC/One-Stop and relative benefits received.*

*The partners agree that renewal of this MOU requires all parties to review and agree to all elements of the MOU and to re-sign the MOU. Any amendments or modifications of the MOU only require the parties to review and agree to the elements of the MOU that changed. Non-substantive changes to the MOU, such as minor revisions to the budget or adjustments made due to the annual reconciliation of the budget, do not require renewal of the MOU. Substantial changes, such as*

*changes in AJCC/One-Stop partners, will require renewal of the MOU. All parties understand that the MOU shall be reviewed every year and updated as substantial changes occur.*

- h. Assurance from all non-co-located partners that they agree to pay their proportionate share of infrastructure costs as soon as sufficient data are available to make such a determination: Signatures of authorized representative(s) of the Local Board, the CEO, and all AJCC partners:*

*The signatories to this MOU Phase II agree to contribute their proportionate share of infrastructure costs for the comprehensive AJCC/One-Stop once sufficient data are available to determine such costs. Costs will be negotiated between the Monterey County Workforce Development Board and the non-co-located partners based on the following:*

- i. Data provided by the State for this purpose.*
- ii. Regulations and directives regarding this requirement issued by the partner's funding source.*
- iii. Locally agreed upon methodology for allocating costs to determine proportionate benefit.*
- iv. Locally agreed upon definition of benefit; and*
- v. Negotiated methods and timeframe for making the agreed upon contribution.*

## Sharing Infrastructure Costs

Budget, Cost Allocation Methodology, Initial Proportionate Share

**The Local Board and AJCC partners have chosen this option for developing the infrastructure cost budget:**

\_\_\_\_\_ Option 1: A separate budget for each AJCC.

**X   Option 2: A consolidated system-wide budget for the network of AJCCs**

\_\_\_\_\_ Option 3: A mixture of separate and consolidated budgets for the Local Area's AJCCs.

## **AJCC(s) and Co-located Partners**

### **AJCC #1 – Comprehensive Site**

Salinas AJCC  
344 Salinas Street  
Salinas, CA 93901

#### **Partners Co-located at This AJCC:**

- Monterey County Workforce Development Board
- Equus Workforce Solutions, WIOA Title 1 Adult / Dislocated Worker
- Turning Point of Central California, WIOA Title 1 Youth
- WIOA Title II – Salinas Adult School
- WIOA Title IV - Department of Rehabilitation

### **AJCC #2 – Affiliate Site**

Monterey Peninsula College Marina Campus  
289 Twelfth Street, Room 402  
Marina, CA 93933  
Affiliate Site

#### **Partners Co-located at This AJCC:**

Equus Workforce Solutions, WIOA  
Title 1 Adult / Dislocated Worker /  
Youth

### **AJCC #3 – Affiliate Site**

1295 La Salle Ave.  
Room #7  
Seaside, CA 93955

#### **Partners Co-located at This AJCC:**

Equus Workforce Solutions, WIOA  
Title 1 Adult / Dislocated Worker /  
Youth

- Monterey Adult School

**AJCC Infrastructure Budget  
Comprehensive AJCC – Salinas  
344 Salinas Street, Salinas, CA 93901 Cost based on Program Year  
through**

<b>Cost Category/Line Item</b>	<b>Line-Item Cost Detail</b>	<b>Cost</b>
<b>Rent</b>		
Rental of Facilities	\$13,697.50 Per Month	\$164,370 Annual
<b>Rental Costs Subtotal:</b>		<b>\$164,370</b>
<b>Utilities and Maintenance</b>		
Electric	Included in Lease	
Gas	Included in Lease	
Water	Included in Lease	
Sewer Connections	Included in Lease	
First Alarm	Included in Lease	
High-Speed Internet	Included in Lease	
Telephones (Landlines)	\$1,706.48 Monthly	\$20,478 Annual
Facility Maintenance Contract	Included in Lease	
<b>Utilities and Maintenance Costs Subtotal:</b>		<b>\$20,478 Annual</b>
<b>Equipment</b>		
Assessment-related products		0
Assistive technologies for individuals with disabilities (Access and Accommodation)		0
Copiers	\$219.28	\$2,631

Fax Machines	\$23.00 Monthly	\$276.00 Annual
Computers & Support Includes Website	\$2,400 Monthly	\$28,800 Annual
Other tangible equipment used to serve all center customers (not specific to an individual program partner)		
Specify Other Tangible Equipment IT Charge	\$11,600 Monthly	\$139,200 Annual
<b>Equipment Costs Subtotal:</b>		<b>\$170,907 Annual</b>
<b>Technology to Facilitate Access to the AJCC</b>		
Technology used for the center's planning and outreach activities		
Specify the Technology		0
Cost of creation and maintenance of a center website (not specific to an individual program partner) that provides outreach to customers by providing information on AJCC services and/or provides direct service access to AJCC services  Website Address: montereycountywdb.org  (Does not include data systems or case management systems specific to individual program partners.)	Included in Computer Support	
<b>Technology to Facilitate Access Costs Subtotal:</b>		<b>0</b>

Fax Machines	\$23.00 Monthly	\$276.00 Annual
Computers & Support Includes Website	\$2,400 Monthly	\$28,800 Annual
Other tangible equipment used to serve all center customers (not specific to an individual program partner)		
Specify Other Tangible Equipment IT Charge	\$11,600 Monthly	\$139,200 Annual
<b>Equipment Costs Subtotal:</b>		<b>\$170,907 Annual</b>
<b>Technology to Facilitate Access to the AJCC</b>		
Technology used for the center's planning and outreach activities		
Specify the Technology		0
Cost of creation and maintenance of a center website (not specific to an individual program partner) that provides outreach to customers by providing information on AJCC services and/or provides direct service access to AJCC services  Website Address: montereycountywdb.org  (Does not include data systems or case management systems specific to individual program partners.)	Included in Computer Support	
<b>Technology to Facilitate Access Costs Subtotal:</b>		<b>0</b>

<b>Common Identifier Costs (Local Option, If Agreed to By All Co-located Partners)</b>		
Creating New AJCC Signage		0
<b>Common Identifier Subtotal:</b>		0

<b>SUMMARY OF TOTAL INFRASTRUCTURE COSTS TO BE SHARED BY CO-LOCATED PARTNERS</b>	
<b>Cost Category</b>	<b>Total Cost</b>
<b>Subtotal: Rental Costs</b>	\$164,370
<b>Subtotal: Utilities and Maintenance Costs</b>	\$20,478
<b>Subtotal: Equipment Costs</b>	\$170,907
<b>Subtotal: Technology to Facilitate Access Costs</b>	
<b>Subtotal: Common Identifier Costs</b>	
<b>TOTAL INFRASTRUCTURE COSTS FOR THIS AJCC/Network:</b>	<b>\$355,755</b>



## **Cost Allocation Methodology to Share Agreed Upon Infrastructure Costs**

Because of the need to provide maximum flexibility to accommodate our partners, costs and budgets in the local area, the cost allocation methodology to share infrastructure costs for the comprehensive AJCC/One-Stop is based on the following:

- Monterey County Workforce Development Board - infrastructure costs shall be calculated based on their program's occupancy percentage of the AJCC/One-Stop (square footage).

The comprehensive AJCC/One-Stop is a leased building which includes utilities such as gas, water, sewer connections and internet access. Some space costs are not allocable to all co-located partners and are therefore assigned proportionately to the partners that use that space. The percentages and usage will be reviewed annually and revised as needed.

**Explanation of Initial Proportionate Share of Infrastructure Costs Allocated to Each Co-located Partner**

The initial proportionate share of infrastructure costs allocated to each partner is based on the agreed upon cost allocation methodology, each partner's estimated total contribution amount, and whether it will be provided through cash, non- cash (in-kind), and/or third-party in-kind contributions. This initial determination must be periodically reconciled against actual costs incurred and adjusted accordingly.

AJCC partners (or their respective state entity) may provide cash, non-cash, and third-party in-kind contributions to cover their proportionate share of infrastructure costs. If non-cash or in-kind contributions are used, they cannot include non-infrastructure costs (such as personnel), and they must be valued consistent with Uniform Guidance Section 200.306 to ensure they are fairly evaluated and meet the partner's proportionate share.

If third-party in-kind contributions are made that support the AJCC(s) as a whole (such as space), that contribution will not count toward a specific partner's proportionate share of the IFA. Rather, the value of the contribution will be applied to the overall infrastructure budget prior to determining proportionate amounts and thereby reduce the contribution required for all partners.

**Third-Party In-Kind Infrastructure Contributions to Support the AJCC As Whole**

<b>Cost Categories</b>	<b>Total Cost</b>	<b>Contributor/s</b>	<b>Value</b>	<b>Balance to Allocate</b>
Rent		None		
Utilities/Maintenance		None		
Equipment		None		
Access Technology		None		
Common Identifier		None		
<b>Total Infrastructure Balance to Be Allocated to Co-located Partners:</b>				

Initial Allocation of Proportionate Share of Infrastructure Costs for Co-located Partners					
Co-located Partner/s	Shared Infrastructure Costs	Application of Methodology	Allocated Initial Share	Amount: Cash	Amount: In-Kind
Partner 1: Monterey County Workforce Development Board, WIOA Title I Adult, Dislocated Worker, and Youth	Rental costs, including utilities, facility maintenance, equipment, and computer/IT support	Proportion of partner program's occupancy percentage of the AJCC (square footage) and benefit use.			None
Partner 2:	Rental costs, including utilities and facility maintenance.	Proportion of partner program's occupancy percentage of the AJCC (square footage) and benefit use.			None; IFA to be negotiated prior to December 31, 2025

**Signature Page: Co-located Partners Sharing AJCC Infrastructure Costs**

The CEO, the Local Board Chairperson, and all co-located AJCC partners included in the sharing of infrastructure costs must sign.

By signing below, all parties agree to the terms prescribed in the IFA.

\_\_\_\_\_  
(CEO)

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
(Local Board Chairperson)

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
(Co-located AJCC Partner Entity)

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
(Co-located AJCC Partner Entity)

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature and Date

**Signature Page: Partners Sharing Infrastructure Costs When Proportionate Share Data Is Available**

MOU Content Requirement:

The State is in the process of implementing the requisite statewide data tracking system, and once such data are available, all non-co-located partners who are receiving benefit from the AJCCs will also be required to contribute their proportionate share towards infrastructure costs. Consequently, the MOU must include an assurance from all non-co-located partners that they agree to pay their proportionate share of infrastructure costs as soon as sufficient data are available.

By signing below, all parties agree that when data are available to determine the AJCC benefit to non-co-located partners, the infrastructure cost sharing agreement will be renegotiated to include their proportionate share of contributions.

\_\_\_\_\_  
(Non-co-located AJCC Partner Entity)

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
(non-co-located AJCC Partner Entity)

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
(Non-co-located AJCC Partner Entity)

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
(non-co-located AJCC Partner Entity)

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature and Date

# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval to Accept CaliforniansForAll Grant

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concurs with the June 12, 2025, Executive Committee recommendation to approve accepting a \$1,998,840 grant from California Volunteers, Office of the Governor, Youth Service Corps (CaliforniansForAll) to provide the Green Cadre program in Monterey County to serve a total of 90 young adults for an 18-month period.

**BACKGROUND:**

The CaliforniansForAll Youth Workforce Development program is a Governor's initiative administered by California Volunteers in partnership with cities and counties across California. In 2022, the CaliforniansForAll program awarded the MCWDB a \$2.8 million dollar grant to fund up to 147 youth in the Green Cadre program. The original purpose of this initiative was to increase youth employment, develop youth interest in and experience towards a career, in the public sector and to strengthen California's capacity to address key areas of climate and food insecurity. The Green Cadre program also provided youth participants with an opportunity to give back to their communities through weekly community services projects working with a number of non-profits and other community-based organizations (CBOs).

In December 2024, the Governor's office announced a new opportunity for counties and cities to apply for another round of funding. MCWDB received approval in January 2025 to apply for this funding.

**DISCUSSION:**

In June 2025, MCWDB was notified that it had secured a grant of \$1,998,840 to service a total of 90 participants over an 18-month period in the Green Cadre program. MCWDB is requesting approval to accept grant funding from CaliforniansForAll grant to continue its efforts to address the climate and food insecurity challenges facing Monterey County while assisting our program participants to learn key skills and earn money through job training, work experience, and placements into employment. MCWDB expects to provide two or three Green Cadre cohorts during 2025-26, with an additional one or two cohorts in 2026-27. Turning Point and Equus Youth programs will be providing the day-to-day supervision and case management for the Green Cadre program, working with the State Parks, the City of Monterey, and the Monterey County Food Bank, in addition to other current and future CBO and non-profit partners.

**NEXT STEPS:**

If the MCWDB approves accepting the CaliforniansForAll grant, the recommendation to accept the funding will be forwarded for consideration by the Board of Supervisors at its meeting of June 24, 2025.

## MEMORANDUM

**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval to Amend One-Stop Operator Agreement

**DATE:** June 26, 2025

### **RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concurs with the June 12, 2025, Executive Committee recommendation to amend the existing agreement with Arbor E&T, LLC, dba Equus Workforce Solutions, to provide One-Stop Operator services within the local workforce development area from July 1, 2025 through June 30, 2026, in an amount not to exceed \$334,532, which includes a performance-based holdback of 10% (\$33,453).

### **BACKGROUND:**

The Workforce Innovation and Opportunity Act (WIOA) contemplates that the One-Stop service delivery system will be managed by a One-Stop Operator responsible to coordinate the delivery of services by One-Stop partners and may include coordinating service delivery between a primary One-Stop Center and affiliated sites. WIOA requires competitive procurement of One-Stop Operators and also requires the concurrence of the chief elected official of the local workforce development area: here, the Monterey County Board of Supervisors.

On May 19, 2022, the Executive Committee approved Equus Workforce Solutions to provide OSO services in the local area for the period of July 1, 2022 through June 30, 2023, for an amount not to exceed \$100,000. The Monterey County Workforce Development Board (MCWDB) subsequently approved a budget for FY 2022-23 that increased the amount of the OSO agreement to \$125,000 based on additional duties and the establishment of performance-based outcomes (PBO). The PBO includes collection of surveys for all service locations; Continuous Quality Improvement (CQI) management, oversight, and support; and monthly and quarterly meetings and reports.

On June 20, 2024, the Executive Committee approved Equus to provide OSO services for FY 2024-25 in the amount of \$135,000 with a performance holdback of 10% (\$13,500), based on MCWDB management's recommendation, to cover increased costs.

### **DISCUSSION:**

The primary functions of the OSO are to coordinate partners within the Monterey County America's Job Center of California (AJCC), ensure the smooth daily operation of the AJCC, coordinate delivery of WIOA services between all One-Stop services providers and partners to communicate and coordinate regarding these services with Monterey County WDB staff. The OSO is required to have a full-time physical presence at the Salinas AJCC and provides oversight of the satellite locations in Marina and Seaside, with the responsibility to ensure the implementation of partner responsibilities and contributions agreed upon in the WIOA Memorandum of Understanding. The OSO also acts as the *Mall Manager* for the

Salinas location, ensuring the daily physical operations of the One Stop, working with building management and vendors to reduce the disruption of services to our participants and the public when they visit the AJCC

For 2025-26, MCWDB's management recommends increasing the annual amount of the OSO agreement with Equus to a total not to exceed \$334,532. The increase in funding is due to the transfer of two front-end staff from the Adult and Dislocated Worker budget to the OSO budget. With the OSO directly overseeing the two front-end staff, the AJCCs will be able to provide better service and an improved customer experience for MCWDB's clients as they access both WIOA and mandated partners' services in the career centers. It is anticipated that the amount of the 2025-26 Adult and Dislocated Worker amendment will be decreased by \$199,532 based on moving the addition of two staff members to the 2025-26 OSO amendment's budget.

Please note that MCWDB expects to release an Request for Proposals (RFP) for OSO services in early 2026.

**NEXT STEPS:**

If the recommendation to amend the OSO agreement with Equus is approved by the MCWDB, staff will develop an amendment to extend the existing agreement.



## MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval to Extend Equus Adult and Dislocated Worker Agreement

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concurs with the June 12, 2025, Executive Committee approval to extend the existing agreement with Arbor E&T, LLC, dba Equus Workforce Solutions, to provide WIOA Title 1 Adult and Dislocated Worker case management services within the local workforce development area from July 1, 2025 through June 30, 2026, in an amount not to exceed \$1,300,000, with \$900,000 provided to serve 293 Adults and \$400,000 to serve 75 Dislocated Workers.

**BACKGROUND:**

Following an Request for Proposal (RFP) process in early 2023, Equus was approved to provide employment services to Adults and Dislocated Workers in Monterey County from July 1, 2023 through June 30, 2024, with case management funding in the amount of \$2,050,000

During 2024-25, Equus supervised the 2023 Severe Winter Storms National Dislocated Worker Grant (NDWG), which involved collaboration with State Parks employees to carry out site-specific missions aimed at the clean-up and beautification of storm-affected areas across Monterey County, including Big Sur, Point Lobos, and Asilomar. The NDWG ends on June 30, 2025. Additionally, in coordination with Monterey County Workforce Development Board (MCWDB) Youth program case managers, Equus staff also worked with Adult and Dislocated Worker participants to prepare them for Certified Nursing Assistant (CNA) training. Working closely with the MCWDB's Management Analyst, Equus also supported Adult and Dislocated Worker participants in Community Health Worker (CHW) training. Finally, Equus enrolled and worked with participants in MCWDB's regional pre-apprenticeship program, which provides 350 hours of hands-on training, including the Multi-Craft Core Curriculum (MC3).

In 2024-25, the Monterey County Workforce Development Board (MCWDB) provided \$1,000,000 to serve 425 Adults and \$900,000 for 75 Dislocated Workers; therefore, relative to Equus' 2024-25 funding levels, the funding for 2025-26 represents a decrease of \$100,000 (10%) to the Adult program and \$500,000 (55%) to the Dislocated Worker program. It should be noted that participant numbers to be served in 2025-26 were reduced to correspond with the new funding amounts for both programs.

**DISCUSSION:**

For the coming fiscal year, Equus will need to focus on meeting the SB 734 training expenditure requirements by providing increased outreach to businesses to source additional transitional job and on-the-job training opportunities. MCWDB expects Equus to increase the level and quality of its services to participants generally, and specifically by providing in-person workshops and online trainings for priority

industry sector and demand occupations. For 2025-26, Equus will also need to increase the number of direct job opportunities in MCWDB's priority sectors.

Staff recommends executing an amendment with Equus for Adult and Dislocated Worker services in 2025-26 to serve 368 individuals (293 Adults and 75 Dislocated Workers), with \$900,000 allocated to the Adult program and \$400,000 for Dislocated Worker. It should also be noted that on February 15, 2025, MCWDB authorized the transfer of \$963,000 of Dislocated Worker funding to the Adult program based on continuing to see lower numbers of Dislocated Workers.

**NEXT STEPS:**

If the recommendation to extend the WIOA Adult and Dislocated Worker services agreement with Equus is approved by the MCWDB, staff will develop an amendment to the existing agreement.

## MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval to Extend Equus Youth Agreement

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concurs with the June 12, 2025, Executive Committee recommendation to approve extending the existing agreement with Arbor E&T, LLC, dba Equus Workforce Solutions, to provide WIOA Title 1 Youth case management services in the northern portion of Monterey County for an agreement term of July 1, 2025 to June 30, 2026, in an amount not to exceed \$650,000 to serve 66 youth.

**BACKGROUND:**

The Workforce Innovation and Opportunity Act (WIOA) enacted a comprehensive youth employment program to serve eligible youth, ages 14 through 24, who face barriers to education, training, and employment. The Monterey County Workforce Development Board (MCWDB) WIOA youth program provides counseling, training, work experience, and placement services, and focuses primarily on out-of-school youth ages 18 through 24.

Equus was selected to provide WIOA Youth services following an Request for Proposal (RFP) process in early 2022 in which only one proposal was received, and based on a sole-source recommendation, Equus was approved to provide WIOA services to youth in the northern portion of Monterey County from July 1, 2022 through June 30, 2023. The 2022-23 agreement executed with Equus was amended for 2023-24 to provide \$750,000 for case management services for 97 youth.

Last year, Equus and Turning Point case managers worked closely together to support several MCWDB initiatives. The Youth programs collaborated to provide the Green Cadre program using CaliforniansForAll funding until September 2024, then used WIOA funding to provide a similar program to continue assisting the residents of Monterey County in the areas of Climate and Food Insecurity. In addition, the programs also provided aerospace manufacturing internships for young adults through Joby Aviation and two Certified Nursing Assistant (CNA) courses through Central Coast College. Finally, in May 2025, the two programs enrolled participants for a Hospitality training cohort.

**DISCUSSION:**

For the coming year, Equus Youth North will need to focus primarily on direct job placements for youth that have completed Work Experience (WEX) or Occupational Skills Training within the MCWDB's priority sectors, in addition to providing increased outreach in their service area and working with CBOs and other stakeholders to increase enrollments based on low enrollments in PY 2024-25. Equus will also need to work with local businesses to obtain additional on-the-job training (OJT) placement opportunities and WEX locations. MCWDB expects Equus to increase the level and quality of services

to youth participants, including new, in-person workshops and online trainings for priority industry sector and demand jobs.

In addition to providing enhanced WIOA programming, the Youth programs will need to develop new, Green Cadre programming with CaliforniansForAll (CA4ALL) funding to serve the communities within Monterey County, based on the recent receipt of a \$1,998,840 grant. Equus Youth North will receive \$128,104 of CaliforniansForAll funding to serve 24 Green Cadre youth participants in FY 2025-26, for a total combined (WIOA + CA4ALL) funding amount of \$778,104 to serve 90 participants.

Staff recommends executing an amendment to the WIOA services agreement with Equus in the amount of \$650,000 to provide case management services to 66 youth in North Monterey County during FY 2025-26.

**NEXT STEPS:**

If the recommendation to extend the WIOA Youth services agreement with Equus is approved by the MCWDB, staff will develop an amendment to extend the existing agreement.

# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval to Extend Turning Point Youth Agreement

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concurs with the June 12, 2025, Executive Committee approval to extend the existing agreement with Turning Point of Central California, Inc., to provide WIOA Title 1 Youth case management services in the southern portion of Monterey County for an agreement term of July 1, 2025 to June 30, 2026, in an amount not to exceed \$700,000 to serve 71 youth.

**BACKGROUND:**

The Workforce Innovation and Opportunity Act (WIOA) enacted a comprehensive youth employment program to serve eligible youth, ages 14 through 24, who face barriers to education, training, and employment. The MCWDB's WIOA youth program provides counseling, training, work experience, and placement services, and focuses primarily on out-of-school youth ages 18 through 24.

Turning Point, a private non-profit, was selected to provide WIOA Youth services following a competitive RFP process in early 2022 in which Turning Point was approved to provide WIOA services to youth in the southern portion of Monterey County from July 1, 2022, through June 30, 2023. The 2022-23 agreement executed with Turning Point was amended for 2023-24 to provide \$750,000 for case management services for 97 youth.

Last year, Equus and Turning Point case managers worked closely together to support several MCWDB initiatives. The Youth programs collaborated to provide the Green Cadre program using CaliforniansForAll funding until September 2024, then used WIOA funding to provide a similar program to continue training participants and assisting the residents of Monterey County in the areas of Climate and Food Insecurity. In addition, the programs also provided aerospace manufacturing internships for young adults through Joby Aviation and two Certified Nursing Assistant (CNA) courses through Central Coast College. Finally, in May 2025, MCWDB's youth programs enrolled participants for a two-week Hospitality training cohort.

**DISCUSSION:**

For the coming year, Turning Point Youth South will need to focus primarily on direct job placements for youth that have completed their Work Experience (WEX) or Occupational Skills Training within the MCWDB priority sectors, in addition to providing increased outreach to local businesses to obtain OJTs and WEX opportunities. MCWDB expects Turning Point and Equus to work together to increase the level and quality of services to youth participants, including new, in-person workshops and online trainings for priority industry sector and demand jobs.

In addition to providing enhanced WIOA programming, the Youth programs will need to develop new, CaliforniansForAll-funded Green Cadre programming to serve the communities within Monterey County, based on the recent receipt of a \$1,998,840 grant. Turning Point South will receive \$128,104 of CaliforniansForAll funding to serve 24 Green Cadre youth participants, and an additional \$74,000 to provide supervision for the Green Cadre program. The total amount to provide the WIOA youth and Green Cadre programs is \$902,104 to serve 95 participants.

Staff recommends executing an amendment with Turning Point in the amount of \$700,000 to provide case management services to 71 youth in South Monterey County during FY 2025-26.

**NEXT STEPS:**

If the recommendation to extend the WIOA Youth services agreement with Turning Point is approved by the MCWDB, staff will develop an amendment to extend the existing agreement.

# MEMORANDUM

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**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval to Amend Outreach and Communication  
Materials Agreement with Pat Davis Design Group

**DATE:** June 26, 2025

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**RECOMMENDATION:**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concurs with the June 12, 2025, Executive Committee approval to amend the existing agreement with Pat Davis Design Group (PDDG), Inc., to design and provide outreach and other communication-related materials for the MCWDB in the amount of \$45,000 for the period from July 1, 2025, through June 30, 2026.

**BACKGROUND:**

The MCWDB was awarded federal Workforce Investment and Opportunity (WIOA) funds to provide employment services and occupational skills training to adults, dislocated workers, and youth. To provide effective outreach to community members who need and will benefit from these services, the MCWDB has executed an agreement and two annual amendments with PDDG to design and produce WIOA-compliant outreach and other communication-related materials with information on programs, services, and activities that meet the needs of job seekers and employers.

PDDG was originally selected in 2018 through a Request for Proposals (RFP) process to host two websites – MCWDB's primary website and a regional website; the website agreement was approved by the Board of Supervisors to continue PDDG's hosting services from July 1, 2021, until June 30, 2024, with two additional, annual renewals.

PDDG was also selected through a 2022 RFQ process to provide outreach and communication materials based on its high-quality products, its understanding of MCWDB's outreach and communication needs, and its ability to reach MCWDB's target populations.

PDDG's original agreement for outreach and communications materials provided \$44,975 for 2022-23, and Amendment No. 1 to the agreement provided an additional \$35,000 for 2023-24. As part of Renewal and Amendment No. 2 for 2024-25, PDDG developed and implemented an Internal Communications Plan and an External Communications / Outreach Plan for MCWDB for an amount not to exceed \$87,973, for a total contract amount of \$167,948.

Both the internal and external plans involve use of MCWDB's website to facilitate communication with MCWDB's stakeholders, including its WIOA Adult, Dislocated Worker, and Youth service providers, local employers, the broader workforce system, and the public.

**DISCUSSION:**

MCWDB is requesting to amend its outreach and communications materials agreement with PDDG for an additional year to add \$45,000 for the period from July 1, 2025 through June 30, 2026, which will serve to align the term of this agreement with the term of the website agreement. It is anticipated that MCWDB will release an RFP in early 2026 to procure a website host with the capability to provide ongoing adjustments to MCWDB's Internal and External Communications / Outreach plans.

**NEXT STEPS:**

If the MCWDB approves executing Amendment No. 3 to the PDDG agreement for outreach and communications materials, the amendment will be developed and forwarded to the Board of Supervisors for approval.





WORKFORCE DEVELOPMENT  
BOARD: 6/26/25  
AGENDA ITEM: 1

# MEMORANDUM

**TO:** Workforce Development Board

**FROM:** Christopher Donnelly

**SUBJECT:** Approval of the Workforce Development Board's Budget  
for Fiscal Year (FY) 2025-26

**DATE:** June 26, 2025

## **RECOMMENDATION**

It is recommended that the Monterey County Workforce Development Board (MCWDB) concur with the June 12, 2025, Executive Committee recommendation to approve the proposed, preliminary Workforce Innovation and Opportunity Act (WIOA) budget for Fiscal Year (FY) 2025-26 as follows:

## **BACKGROUND**

On May 28, 2025, the State of California Employment Development Department (EDD), Workforce Services Division, released Information Notice WSIN24-45, providing Workforce Innovation and Opportunity Act (WIOA) Title I formula funding allocations for Fiscal Year (FY) 2025–26 for each of the 45 Local Workforce Development Area's (LWDA), for the Adult, Dislocated Worker, and Youth programs. It is important to note that the MCWDB receives only 14% of its Adult and Dislocated Workers allocation on July 1, 2025, and the remaining balance on October 1, 2025. The Youth allocation funding is available on July 1 at 100%.

### **Monterey County Workforce Development Board - WIOA Funding Summary 2025-26**

<b>WIOA Adult Formula Funding Allocation</b>	<b>WIOA Dislocated Worker Formula Funding Allocation</b>	<b>WIOA Youth Formula Funding Allocation</b>
Program 90% \$2,283,545	Program 90% \$2,332,002	Program 90% \$2,323,164
Admin 10% \$253,727	Admin 10% \$259,111	Admin 10% \$258,129
<b>Total Allocation: \$2,537,272</b>	<b>Total Allocation: \$2,591,113</b>	<b>Total Allocation: \$2,581,293</b>
<b>Total Projected Revenue from WIOA Formula Funding Allocations: \$7,709,678</b>		

Projected Carry-in from PY 2024-25	
Adult	\$265,565
Dislocated Worker	\$532,689
Youth	1,210,631
<b>Total Projected Carry-in from PY 2024-25</b>	<b>\$2,008,885</b>

Funding for Program Year 2025-26	
Total Projected Revenue from WIOA Formula Funding Allocations	\$7,709,678
Total Projected Carry-in from PY 2024-25	\$2,008,885
<b>Total Funding</b>	<b>\$9,718,563</b>
Admin (10%)	(\$770,968)
<b>Total Funding for 2025-26</b>	<b>\$8,947,595</b>

**WIOA Training Fund and Work Experience Requirements:** This set-aside meets the SB 734 training expenditure requirement for the MCWDB to expend 30% of its combined total of WIOA Title I Adult and Dislocated Worker formula funds on training.

**SB 734 (30% of Adult/DW for training): \$1,384,663.95**

- Adult: \$685,063.44
- DW: \$699,600.51

**Youth WEX (20%): \$464,632.74**

This set-aside amount meets the 20% minimum work experience expenditure requirement.

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**Available Program Funds for FY 2025–26 (Formula + FY25 Carry-In):**

After deducting administrative costs and the required SB 734 set-aside, the total available funding for program-related personnel and non-personnel services is **\$7,098,298**.

Category	Adult	DW	Youth	Total
Available for Use:	\$1,864,046	\$2,165,090	\$3,069,1652	\$7,098,298

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## Available funds for program operations

### Personnel:

**Total Salaries: \$1,654,671** This represents the total salaries and benefits for the 12 MCWDB employees who support day-to-day operations.

- Allocated equally across all funding streams

**Non-Personnel Costs:** include expenses such as rent, supplies, equipment, travel, and participant support that are not related to staff wages or benefits.

Category	Total	Category	Total
Rent	\$336,089	Slingshot Temp Staffing	\$15,000
IT & Telecom	\$272,000	Computers (Annual Lease)	\$35,000
COWCAP	\$192,975	MIPs	\$13,000
County Counsel	\$45,000	Contracts: (ETPL & Monitoring)	\$10,000
Other Operating Costs	\$269,500	Contracts: (Monitoring/Web/Outreach)	\$125,000
Staff Development/Training	\$45,000	Studies	\$25,000
Travel & Conferences	\$12,500	Outreach Materials	\$45,000
Workers Comp (Participants)	\$95,000	Chmura	\$9,000
Copier Lease	\$10,000	Launchpad	\$32,000
Calendaring/Texting Tools	\$15,000	<b>Total non-personnel Costs:</b>	<b>\$1,602,064</b>

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*Case Management - Case Management services are essential in supporting participants throughout their workforce development journey. Proposed allocations are divided among the following programs:*

<b>Adult: \$900,000</b>	Adult Program offers employment, education, and training services to individuals aged 18 and older, prioritizing veterans, low-income individuals, and those facing barriers to employment. Services include job search assistance, career counseling, skills assessments, training, and support to help participants secure and advance in meaningful careers.
<b>DW: \$400,000</b>	Dislocated Worker Program helps individuals who have lost their jobs due to layoffs or business closures. It offers career counseling, job search support, training, and other services to assist them in finding new employment.
<b>Youth: \$1,350,000</b>	Youth Program serves youth facing barriers to education and employment. It provides education, training, work experience, and supportive services to help youth build skills and succeed in their careers.
<b>One-Stop Operator (OSO): \$334,532</b>	Coordinates service delivery across workforce partners at the America's Job Center of California (AJCC) to ensure efficient, integrated services for all customers. OSO is not a direct case management provider but plays a vital role in oversight and system alignment.
<b>Total Case Management and OSO</b>	<b>\$2,984,532</b>

*Client Services: These are direct services and support provided to participants, which include funding for youth Individual Training Accounts (ITAs), supportive services (e.g., transportation), pre-vocational workshops, assessments, and other client-related services that help individuals succeed in training, education, and employment.*

<b>Youth ITAs</b>	\$60,000
<b>Supportive Services</b>	\$45,000
<b>Pre-Vocational Workshops</b>	\$20,000
<b>WorkKeys Assessments</b>	\$18,000
<b>Total Client-Related Services</b>	<b>\$143,000</b>
<b>Other Client Services</b>	
<b>Business Services Enhancements</b>	\$200,000
<b>Educational Training Coordinator</b>	\$135,000
<b>Total of Other Client-Related Services</b>	<b>\$335,000</b>

Total Case Management and OSO	\$2,984,532
Total Client-Related Services	\$143,000
Total of Other Client Services	\$335,000
<b>Grant Total for Case Management, Client Related Services &amp; Other Client Services</b>	<b>\$3,462,532</b>

#### **Board-Mandated Reserve (10%): \$770,968**

During the last five years, the MCWDB has experienced large carry-in funds, primarily due to the lasting budget impacts of the COVID-19 pandemic. Program operations and participant engagement were significantly impacted, which lead to limited service availability and reduced enrollments in all funding streams, primarily in the Dislocated Workers program. As a result, spending was lower while MCWDB focused on rebuilding and gradually increasing services and enrollments. The MCWDB is projecting a smaller carry-in amount from 2024-25, which is an indication that programs are now fully operational, and that funds are being utilized more efficiently. Given this shift, staff recommends mandating a 10% reserve to ensure fiscal stability and flexibility in future years, particularly to manage unforeseen challenges or modifications in funding levels.

- 10% reserve to be evenly divided across programs break-out by funding stream.

#### **WIOA Allocations Overview**

For FY 2025–26, the MCWDB received a total WIOA allocation of **\$7,709,678**, representing an **increase of \$670,289** over the previous year's allocation of \$7,039,389. This reflects an **overall funding increase of 9.5%**, as shown below:

<b>Funding Stream</b>	<b>FY 24–25</b>	<b>FY 25–26</b>	<b>Annual \$ Change</b>	<b>% Change</b>
WIOA Adult Formula	\$2,456,158	\$2,537,272	+\$81,114	+3.3%
WIOA Dislocated Worker Formula	\$2,069,587	\$2,591,113	+\$521,526	+25.2%
WIOA Youth Formula	\$2,513,644	\$2,581,293	+\$67,649	+2.7%
<b>Total Formula Grants</b>	<b>\$7,039,389</b>	<b>\$7,709,678</b>	<b>+\$670,289</b>	<b>+9.5%</b>

## DISCUSSION

This is a comparative analysis of the FY 2024–25 vs. FY 2025–26 WIOA Budgets for MCWDB, identifying where reductions occurred and providing reasons for those reductions, despite an overall increase in WIOA formula funding.

Category	FY 24–25	FY 25–26	Change	%Change	Explanation
WIOA Formula Allocations (Adult, DW, Youth)	\$7,039,389	\$7,709,678	+\$670,289	+9.5%	Increase across all streams, especially DW (+25.2%)
Projected Carry-In	\$4,555,432	\$2,008,885	(\$2,546,547)	–55.9%	Less unspent funds from PY 24–25 due to higher program expenditures and obligation requirements.
Total Available Budget	~\$11.6M	~\$9.7M	(\$1.9M)	–16.4%	Despite more funding, less carry-in led to overall reduction.
Case Management Subcontracts	\$3.5M	\$2.9M	(\$600,000)	–17.1%	AD: \$1.0M → \$900K DW: \$900K → \$400K Youth: \$1.5M → \$1.35M OSO: \$135K → \$334,532
MCWDB Staff Salaries & Benefits	\$2,065,607	\$1,654,671	(\$410,936)	–19.9%	Not staffing vacant positions to reduce costs.
Supportive Services	\$120,000	\$50,000	(\$70,000)	–58.3%	Reduced due to prior-year spending levels.
Youth ITAs	\$30,000	\$60,000	+\$30,000	+100%	Increased to support youth vocational training participation.
Pre-Vocational Training	\$60,000	\$23,000*	(\$37,000)	–61.7%	Projected based on FY 24–25 spending level.
Business Services Enhancements	\$200,000	\$200,000*	\$0	0%	No change
Transitional Jobs Coordinator	\$110,000	\$0	(\$110,000)	–100%	Role eliminated due to cost constraints.
Education/Training Director	\$158,700	\$135,000	(\$23,700)	–14.9%	Partial cost reduction: position retained at lower funding level.
One-Stop Operator (OSO)	\$135,000	\$334,532	+\$199,532	+147.8%	Includes transfer of 2 staff from AD and DW programs to OSO oversight.
Reserve (10%)	N/A	\$770,968	New category	New	New policy to support long-term continuity in service delivery.

### Key Areas of Budget Reduction

#### 1. Staff Salaries & Operating Costs

- Reason: To offset a significant drop in carry-in and rising fixed costs (e.g., rent, insurance), staffing expenses were reduced by nearly 20%. Positions/Role consolidation.

## 2. Case Management (especially AD)

**AD Case Management** reduction from **\$1.4M → \$900K**.

- Reason: Based on the reduction in available funding due to reduced funds carried in, case management contracts have been reduced.

### **Supportive Services**

- Cut by over **58%**.
- Reason: The reduction was based on actual expenditures from FY24-25.

### **Pre-Vocational Training & Workshops**

- Reason: The reduction was based on actual expenditures from FY24-25.

## 5. Transitional Jobs Coordinator

- Eliminated.
- Reason: Cost-saving decision was made due to underutilization based on low enrollments of Transitional Jobs participants in the Adult and DW programs.

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## Areas of Increase

### 1. Training & Compliance Set-Asides (SB 734, Youth WEX)

- Increased in dollar terms to meet state-mandated percentages.
- Adult/DW training: \$1.22M → **\$1.38M**
- Youth WEX: \$452K → **\$464K**

### 2. Youth ITAs

- Increased funding reflects a commitment to expanding access to vocational education for youth.

### 3. Board-Mandated Reserve

- New policy: 10% of available funds (~\$770,968) held in reserve to ensure fiscal stability, program continuity, and compliance, and to offset any major reduction in WIOA funding for 2025-26 program year.

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## Conclusion

While WIOA funding increased in FY 2025–26, lower carry-in balances and higher compliance obligations created a funding restriction. This restriction required reductions in case management services for the Adult and Youth programs, staffing, and non-mandated program areas to ensure statutory compliance and fiscal sustainability.

### **MCWDB's focus has shifted to:**

- Preserving training investments (SB 734 & Youth WEX);
- Protecting essential workforce development structure; and
- Preparing for future funding uncertainties through a mandated reserve.

25-26 Budget Proposed based on Projected DOL Funding						
Allocations			33%	34%	33%	100%
			Adult	DW	Youth	
Sources			\$ 2,537,272	\$ 2,591,113	\$ 2,581,293	\$ 7,709,678
Sources Reduction						
Admin 10%			\$ 253,727	\$ 259,111	\$ 258,129	\$ 770,968
Program 90%			\$ 2,283,545	\$ 2,332,002	\$ 2,323,164	\$ 6,938,710
Carry in 24-25			\$ 265,565	\$ 532,689	\$ 1,210,631	\$ 2,008,885
Total Funding	\$ 8,947,595		\$ 2,549,109	\$ 2,864,691	\$ 3,533,795	\$ 8,947,595
Uses'						
SB 734			\$ 685,063	\$ 699,601		\$ 1,384,664
Youth WEX					\$ 464,633	\$ 464,633
						\$ 7,098,298
Available Funding	\$ 7,098,298		\$ 1,864,046	\$ 2,165,090	\$ 3,069,162	\$ 7,098,298
Personnel						
Salaries	\$ 1,654,671		\$ 546,042	\$ 562,588	\$ 546,042	\$ 1,654,671
Non Personnel						
Rent -	\$ 336,089		\$ 110,909	\$ 114,270	\$ 110,909	\$ 336,089
IT& Telecom	\$ 272,000		\$ 89,760	\$ 92,480	\$ 89,760	\$ 272,000
COWCAP	\$ 192,975		\$ 63,682	\$ 65,612	\$ 63,682	\$ 192,975
County Counsel	\$ 45,000		\$ 14,850	\$ 15,300	\$ 14,850	\$ 45,000
Other operating cost	\$ 269,500		\$ 88,935	\$ 91,630	\$ 88,935	\$ 269,500
Staff Development/Training	\$ 45,000		\$ 14,850	\$ 15,300	\$ 14,850	\$ 45,000
Travel -Conference	\$ 12,500		\$ 4,125	\$ 4,250	\$ 4,125	\$ 12,500
Workers Comp - Participants	\$ 95,000		\$ 31,350	\$ 32,300	\$ 31,350	\$ 95,000
Copy Machine Rental	\$ 10,000		\$ 3,300	\$ 3,400	\$ 3,300	\$ 10,000
Calendaring/Texting Tools	\$ 15,000		\$ 4,950	\$ 5,100	\$ 4,950	\$ 15,000
Case Management Contracts						
Adult	\$ 900,000		\$ 900,000			\$ 900,000
DW	\$ 400,000			\$ 400,000		\$ 400,000
Youth CM	\$ 1,350,000				\$ 1,350,000	\$ 1,350,000
One Stop Operator	\$ 334,532		\$ 110,396	\$ 113,741	\$ 110,396	\$ 334,532
Client Related Services						
Youth ITA's	\$ 60,000				\$ 60,000	\$ 60,000
Supportive Services	\$ 45,000		\$ 14,850	\$ 15,300	\$ 14,850	\$ 45,000
Pre Voc Workshops	\$ 20,000		\$ 6,600	\$ 6,800	\$ 6,600	\$ 20,000
WorkKeys	\$ 18,000		\$ 5,940	\$ 6,120	\$ 5,940	\$ 18,000
Other client Related Services						
Business Services Enhancements	\$ 200,000		\$ 100,000	\$ 100,000		\$ 200,000
Transitional Jobs Coordinator						\$ -
Educational Training Coordinator	\$ 135,000		\$ 44,550	\$ 45,900	\$ 44,550	\$ 135,000
Other Non Personnel						
Computers Annual lease	\$ 35,000		\$ 11,550	\$ 11,900	\$ 11,550	\$ 35,000
MIPs	\$ 13,000		\$ 4,290	\$ 4,420	\$ 4,290	\$ 13,000
Contracts -other						
T/A- ETPL monitoring	\$ 10,000		\$ 3,300	\$ 3,400	\$ 3,300	\$ 10,000
Monitoring -Adult/DW/Youth	\$ 40,000		\$ 13,200	\$ 13,600	\$ 13,200	\$ 40,000
PDDG -Webhosting	\$ 40,000		\$ 13,200	\$ 13,600	\$ 13,200	\$ 40,000
PDDG - Outreach material/design	\$ 45,000		\$ 14,850	\$ 15,300	\$ 14,850	\$ 45,000
Studies	\$ 25,000		\$ 8,250	\$ 8,500	\$ 8,250	\$ 25,000
Outreach materials	\$ 45,000		\$ 14,850	\$ 15,300	\$ 14,850	\$ 45,000
Slingshot Temp Staffing	\$ 15,000		\$ 4,950	\$ 5,100	\$ 4,950	\$ 15,000
Chmura	\$ 9,000		\$ 2,970	\$ 3,060	\$ 2,970	\$ 9,000
Launchpad	\$ 32,000		\$ 10,560	\$ 10,880	\$ 10,560	\$ 32,000
10% Board madanted Reserve	\$ 770,968		\$ 254,419	\$ 262,129	\$ 254,419	\$ 770,968
Totals	\$ 7,490,235		\$ 2,511,478	\$ 2,057,280	\$ 2,921,478	\$ 7,490,235
	\$ (391,937)		\$ (647,432)	\$ 107,810	\$ 147,685	\$ (391,937)

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## **Update on Monterey County Workforce Development Board FY 2024-25 Budget and Expenditures**

### **Overview of Expenditures**

This memorandum provides a summary of expenditures for the Workforce Innovation and Opportunity Act (WIOA) programs managed by the Monterey County Workforce Development Board (MCWDB), covering the Adult, Dislocated Worker, and Youth programs for the third quarter of Fiscal Year 2024–25.

From July 1, 2024, through May 31, 2025, total expenditures amount to \$6,228,754. These figures have been imported from the County of Monterey's Advantage Financial System into the WDB's internal financial system, MIP. The expenditures are allocated as follows:

- **Adult Program:** \$3,159,706
- **Dislocated Worker (DW) Program:** \$1,413,570
- **Youth Program:** \$1,655,478

***Note:*** An updated budget sheet reflecting expenditures through May 31, 2025, will be provided at the meeting.



### **Update on the Pajaro Small Business Assistance Program**

Management Analyst Vanessa Kor will provide an update on the Pajaro Small Business Assistance program, and a handout with additional information on the status of the program will be provided at the meeting.

**Update on 2023-24 State of California Employment Development Department  
(EDD) and 2024-25 Monterey County Workforce Development Board  
(MCWDB) Subrecipient Monitoring**

MCWDB Executive Director Chris Donnelly will provide an update on 2023-24 EDD and 2024-25 internal MCWDB monitoring.

## **Update on Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker, and Youth Program Activities**

### **Adult and Dislocated Worker (ADW) Program:**

#### **High Road Construction Careers (HRCC) Pre-Apprenticeship Program**

The HRCC program is a 10-week apprenticeship preparation program funded by a discretionary grant from the State of California. In the second week of April, the Monterey County Workforce Development Board (MCWDB) enrolled 17 participants in the HRCC pre-apprenticeship program, which integrates classroom instruction with hands-on construction training. Staff visits the training site weekly to ensure continued participant support and progress tracking.

During a recent visit, several participants were seen marking lines for upcoming crack-line work on concrete, while others cleared concrete residue from wood and stacked materials near the fence in preparation for building the back-area wall.



#### **Hiring Events and Employer Engagement**

Employer engagement remained robust from April through mid-June 2025, including:

- Staff participation in the April 12 South County Employment & Resource Fair and the April 18 Veterans Stand Down, strengthening regional employer relationships.
- A Salinas job fair on April 23 that drew 94 job seekers and 12 employers, with media coverage on KSBW-TV.
- Youth and young adult job fairs that were held on May 14 in Salinas and May 17 at Monterey Adult School in Seaside.
- A successful Transportation Industry hiring event on May 28 with strong job seeker turnout and multiple on-site interviews.
- A Salinas Job fair on June 11 that drew 81 job seekers and 7 employers.

### **On-the-Job Training (OJT)**

OJT makes an impact in the lives of participants as well as on local employers' businesses:

#### **OJT Employer Testimonial**

*"As a business owner and broker, I am incredibly thankful for the On-the-Job Training (OJT) program and the amazing support provided by Monterey County Works. Their team has made a real difference in helping a small business like mine grow. The OJT program has allowed me to confidently invest in training new talent without the fear of losing them after they're trained. The Business Services Team has been fantastic, always available, communicative, and supportive throughout the process, even guiding me to complete important documents like our employee handbook and everything required to become a host site. One of the most rewarding outcomes has been seeing an employee who started with us as a transaction coordinator complete the OJT training, stay with our company, study for his state exam, and become a licensed realtor. Programs like this create real impact—for employers and employees alike. I couldn't be more grateful."*

— Lucila Borghezan, Owner/Broker, Century 21 A Property Shoppe



### **Innovative Workforce Readiness Tools**

Staff participated in a train-the-trainer session with Transfer VR, introducing virtual reality tools into MCWDB's workforce training portfolio. This forward-thinking resource aligns with MCWDB's commitment to innovation in job readiness programming.

### **Workshop Summary**

In-person workforce development workshops play a vital role in boosting participant confidence and enhancing job readiness. Recent sessions have included *Interviewing for Success*, *Resume Makeover II*, *Professional Development*, *Job Search Success Beyond 50*, and *Transform Your Interview II*.

## Youth Programs

### **WIOA-Funded Green Cadre**

MCWDB's WIOA-funded Green Cadre program graduated in May. The Cadre participants were recognized by the California Parks and Recreation Society for their contributions and took a pledge to combat climate change. Graduates have been attending job fairs and applying for employment throughout Monterey County. Staff is working diligently with the participants to help them find employment.

### **JOB Tech Cadre**

MCWDB has partnered with Joby Aviation for the Tech Cadre program in Marina, a WIOA internship program for 8-10 weeks during the summer. Joby has selected six participants for the program that began on June 16, 2025.

### **Hospitality Cadre**

The Hospitality Cadre's 10 participants have received their OSHA 10, Food Handler, and National Association of Entrepreneurship & Business certifications and credentials. Participants are interviewing and being placed with our hospitality partners: Best Western, the Steinbeck House, Odyssey Freediving, Taqueria Mi Ranchito, Kona Steak House & Seafood, Work Horse Bicycles and the Pacific Inn. Youth are being prepared with mock interviews to set them up for successful interviews with these employers.



## **Discussion on Recruitment of New Monterey County Workforce Development Board Members Representing Business**

MCWDB Chair Erik Cushman will lead a discussion on the recruitment of additional Business members needed for compliance with the Workforce Innovation and Opportunity Act (WIOA).

### **Update on Board Members' Workforce and Business Activities**

Board members will provide updates on their workforce and business-related activities.