



SPECIAL EXECUTIVE COMMITTEE MEETING AGENDA PACKET

Thursday, August 28, 2025
9:00 a.m. - 10:30 a.m.

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. 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) 796-3505. TTY/CRS: Dial 711.

NOTICE TO THE PUBLIC

Members of the public who wish to address the Committee 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 Committee 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 Committee Members will present recommendations for each action item on the agenda.
- Committee members may ask questions of Workforce Development Board Staff and other Committee Members.
- Members of the public wishing to make a comment on an agenda item will be given two (2) minutes each to comment.
- The Committee 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) 796-6434
www.montereycountywdb.org

WDB Executive Committee:

Erik Cushman,
WDB & Executive Chair

Cesar Lara
Paula Calvetti

Monterey County Workforce Development Board Special Executive Committee Meeting

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

Thursday, August 28, 2025; 9:00 a.m.

AGENDA

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| CALL TO ORDER/ROLL CALL: | Erik Cushman, <i>Chair</i> |
| CHANGES TO AGENDA: | |
| PUBLIC COMMENT: <i>(Limited to 2 minutes per person)</i> | |
| DIRECTOR'S REPORT: | Chris Donnelly |
| CONSENT CALENDAR: | Erik Cushman |
| 1. ACTION: Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) Executive Committee meeting on June 12, 2025. | Erik Cushman |
| DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS: | Erik Cushman |
| 1. ACTION: Consider and approve the appointment of Larry Hartman, representing Business and filling an unexpired Business representative's term, for a term to expire on December 7, 2027, and that the MCWDB forward the appointment to the Board of Supervisors for final approval. | Erik Cushman |
| 2. ACTION: Consider and approve the following policy: <ul style="list-style-type: none">• 2025-08 Local Eligible Training Provider List (ETPL) Policy | Elizabeth Kaylor |
| 3. Update on MCWDB's Fiscal Year (FY) 2025-26 WIOA budget. | Daisy Fernandez |
| 4. Update on MCWDB's FY 2024-25 budget closeout. | Daisy Fernandez |
| 5. Update on the Pajaro Small Business Assistance program. | Chris Donnelly |
| 6. Discussion on MCWDB's Community Builder Awards ceremony scheduled for December 3, 2025. | Pearl Sanchez |
| 7. Update on 4 th Quarter Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker, and Youth program performance. | Pearl Sanchez |
| 8. Discussion on the ETPL/On-the-Job Training (OJT) Provider Report Card. | Chris Donnelly |
| 9. Update on WIOA Adult, Dislocated Worker, and Youth programs. | Lucy Iracheta Lourdes Luviano Michael Artalejo |
| 10. Updates on Executive Committee members' workforce and business activities. | Erik Cushman |
| ANNOUNCEMENTS: | Erik Cushman |
| ADJOURNMENT | Erik Cushman |
| SUBCOMMITTEE MEETINGS: Executive: SEPTEMBER 18, 2025 | WDB MEETING/RETREAT OCTOBER 23, 2025 Erik Cushman |

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UNADOPTED MINUTES

Monterey County Workforce Development Board Executive Committee Meeting
America's Job Center of California, 344 Salinas Street, Suites 205 & 206, Salinas, CA 93901
Thursday, June 12, 2025

Members Present: Erik Cushman (Chair), Cesar Lara, Paula Calvetti

Members Absent: None

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

Public Comment: None

Call to Order/Introductions: Erik Cushman called the meeting to order at 9:06 a.m. A quorum was established.

Changes to Agenda: None

Consent Calendar:

1. **ACTION:** Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) Executive Committee meeting on May 15, 2025.
A motion was made by Cesar Lara to approve the Consent Calendar, seconded by Paula Calvetti. ALL AYES. Motion passed.

Discussion or Review of Business Calendar Action Items:

1. **ACTION:** Consider and approve the reappointment of Paula Calvetti, representing Business, for a term anticipated to expire on June 17, 2028, and that the MCWDB forward the reappointment to the Board of Supervisors for final approval.
A motion was made by Cesar Lara to approve the reappointment of Paula Calvetti to the Workforce Development Board, seconded by Paula Calvetti. ALL AYES. Motion passed.
2. **ACTION:** Consider and approve the reappointment of Salvador Munoz, representing Business, for a term anticipated to expire on June 17, 2028, and that the MCWDB forward the reappointment to the Board of Supervisors for final approval.
A motion was made by Cesar Lara to approve the reappointment of Salvador Munoz to the Workforce Development Board, seconded by Paula Calvetti. ALL AYES. Motion passed.
3. **ACTION:** Consider and approve the reappointment of Michael Gutierrez, representing Education, for a term anticipated to expire on June 17, 2028, and that the MCWDB forward the reappointment to the Board of Supervisors for final approval.
A motion was made by Cesar Lara to approve the reappointment of Michael Gutierrez to the Workforce Development Board, seconded by Paula Calvetti. ALL AYES. Motion passed.
4. **ACTION:** Consider and approve the reappointment of Cesar Lara, representing Labor, for a term anticipated to expire on June 17, 2028, and that the MCWDB forward the reappointment to the Board of Supervisors for final approval.
A motion was made by Cesar Lara to approve the reappointment of Cesar Lara to the Workforce Development Board, seconded by Paula Calvetti. ALL AYES. Motion passed.
5. **ACTION:** Consider and approve the proposed, preliminary 2025-26 MCWDB Budget.
A motion was made by Cesar Lara to approve the proposed, preliminary 2025-26 MCWDB Budget, seconded by Paula Calvetti. ALL AYES. Motion passed.

6. **ACTION:** Consider and approve extending the agreement with Arbor E&T, dba Equus Workforce Solutions, to provide Workforce Innovation and Opportunity Act (WIOA) One-Stop Operator Services in the amount of \$334,532 for Program Year (PY) 2025-26 and forward the recommendation to the full board for consideration at its meeting of June 18, 2025.
A motion was made by Cesar Lara to approve extending the agreement with Arbor E&T to provide Workforce Innovation and Opportunity Act (WIOA) One-Stop Operator Services, seconded by Paula Calvetti. ALL AYES. Motion passed.
7. **ACTION:** Consider and approve extending the agreement with Arbor E&T, dba Equus Workforce Solutions, to provide WIOA Adult and Dislocated Worker Services in the amount of \$1,300,000 for PY 2025-26 and forward the recommendation to the full board for consideration at its meeting of June 18, 2025. **A motion was made by Paula Calvetti to approve the extending the agreement with Arbor E&T to provide WIOA Adult and Dislocated Worker Services, seconded by Cesar Lara. ALL AYES. Motion passed.**
8. **ACTION:** Consider and approve extending the existing agreement with Arbor E&T, dba Equus Workforce Solutions, to provide WIOA Title I Youth Services in the amount of \$650,000 in North Monterey County for PY 2025-26 and forward the recommendation to the full board for consideration at its meeting of June 18, 2025.
A motion was made by Cesar Lara to approve extending the agreement with Arbor E&T to provide WIOA Title I Youth Services, seconded by Paula Calvetti. ALL AYES. Motion passed.
9. **ACTION:** Consider and approve extending the existing agreement with Turning Point of Central California to provide WIOA Title I Youth Services in the amount of \$700,000 in South Monterey County for PY 2025-26 and forward the recommendation to the full board for consideration at its meeting of June 18, 2025.
A motion was made by Cesar Lara to approve extending the agreement with Turning Point of Central California to provide WIOA Title I Youth Services, seconded by Paula Calvetti. ALL AYES. Motion passed.
10. **ACTION:** Consider and approve extending the existing agreement for communication materials with Pat Davis Design Group in the total amount of \$45,000 for PY 2025-26, and forward the recommendation to the full board for consideration at its meeting of June 18, 2025.
A motion was made by Cesar Lara to approve extending the agreement with Pat Davis Design Group for communication materials, seconded by Paula Calvetti. ALL AYES. Motion passed.
11. **ACTION:** Consider and approve the 2025-2028 WIOA One-Stop Partner Memorandum of Understanding (MOU).
A motion was made by Paula Calvetti to approve the 2025-2028 WIOA One-Stop Partner Memorandum of Understanding (MOU), seconded by Cesar Lara. ALL AYES. Motion passed.
12. **ACTION:** Consider approval of funding from the California Volunteers, Office of the Governor, Youth Service Corps in the amount of \$1,998,840 to the MCWDB to fund the Green Cadre Youth program.
A motion was made by Paula Calvetti to approve the funding from California Volunteers, Office of the Governor, Youth Service Corps, seconded by Cesar Lara. ALL AYES. Motion passed.
13. Finance Manager Daisy Fernandez presented an update on MCWDB's FY 2024-25 budget and expenditures through April 30, 2025.
14. Management Analyst Vanessa Kor presented an update on the Pajaro Small Business Assistance program.

15. Vanessa Kor and Management Analyst Linda Avakian presented updates on WIOA Adult, Dislocated Worker, Youth, and Business Services performance.
16. Executive Director Chris Donnelly presented an update on 2023-24 State of California Employment Development Department (EDD) monitoring and 2024-25 MCWDB subrecipient monitoring.
17. Service provider representatives Lucy Iracheta and Lourdes Luviano of Equus, and Michael Artalejo of Turning Point, gave updates on the WDB's Adult, Dislocated Worker, and Youth programs.
18. Executive Committee members discussed the recruitment of new MCWDB members representing Business.
19. Executive Committee members provided updates on their workforce and business activities.

Adjournment: Meeting Adjourned at 11:03 am.



EXECUTIVE COMMITTEE: 8/28/2025
AGENDA ITEM: 1

MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Approval of Appointment of Larry Hartman,
Representing Business

DATE: August 28, 2025

RECOMMENDATION:

It is recommended that the Executive Committee approve the appointment of Larry Hartman, representing Business, to the Monterey County Workforce Development Board.

BACKGROUND:

Mr. Hartman, Director of Branch Administration for Wescom Financial, has applied for membership to the full Workforce Development Board. Mr. Hartman will be filling an unexpired Business representative's term to expire on December 7, 2027.

As the nominating body, the Executive Committee is asked to consider Mr. Hartman's application and recommend it for full Workforce Development Board approval at its meeting on October 23, 2025.

ATTACHMENTS:

Mr. Hartman's application

Today's Date

07/08/2025

CONTACT INFORMATION**Name:**

Larry Hartman

Title:

Director, Branch Administration

Phone:

831-207-1419

Mobile Phone:

831-207-1419

Email:

lhartman@wescom.org

City of Residence:

Marina

BUSINESS INFORMATION**Business Name:**

Wescom Financial

Business Address:

130 General Stillwell Dr
Marina, CA 93933
[Map It](#)

Business Website:

<https://wescom.org>

Number of Current Employees:

990

Number of Years with Current Business:

7

Number of Years the Business has been in business in Monterey County:

75

Please describe the nature of the Business and your position within the Business:

Wescom is a not-for-profit financial organization that offers a full suite of financial products and services to its members including financial literacy workshops to all residents of the communities in which we serve. We have

four retail offices and a regional admin office in Monterey County. And an additional 26 branches in the Los Angeles area. Wescom created Wescom Foundation to financially support local nonprofit organizations that better the lives of Californians. Over \$4.9 million has been invested to date around critical human needs, financial wellness, and disaster response.

My current role as Director of Branch Administration over sees day to day activities to ensure our branches are open and operational to serve our members within the communities of Marina, Salinas, Soledad and King City. In addition, I lead our corporate partnership initiatives partnering with local businesses and nonprofit organizations offering and delivering over 20 various financial workshops.

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

Wescom Association/Member

Salinas Chamber of Commerce
Monterey Chamber of Commerce
Soledad Rotary
King City Rotary
Monterey Rotary

We partner and actively get involved with many other various not-for-profit organizations like United Way, Monterey County Free Libraries, Marina Foundation, Rancho Cielo, Alliance on Aging, etc.

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

None

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

Oversee day to day operations ensuring policy/procedures are followed within retail branch operations. Ensuring all banking compliance and regulatory rules are followed by team members. Responsibilities include physical branch facilities (repairs/remodels), IT hardware, systems, cash, security and branch safety.

In addition, promote team involvement in our Foundation, and community events like Salinas Pride, Rodeo, Airshow, etc. We set goals, track, and report our financial wellness activities like workshops offered and presented within the communities we serve. We focus on the under banked or non-banked members of our communities.

Monterey County Workforce Development Board

What do you hope to contribute from your participation on the Monterey County Workforce Development Board?

Over 37 years ago I started as an hourly employee making \$4.10 an hour at a small hometown bank in Indiana. I worked there over 25 years, while finishing my BS degree in Business and becoming a Vice President of Operations. That was accomplished by opportunities presented to me to learn and develop new skills, talents, and trades. I was afforded many opportunities to grow and learn new skills, and along the way in leadership roles I afford the same opportunities to others.

Providing a path for development of others to success in their careers has been the highlight of my career in banking. My contribution will be to continue providing paths for others to gain, develop, and grow their careers while providing hiring managers and leaders with the community a solid talent pool for recruiting and promoting from within.

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 Workforce Development Board, as applicable?

I've planned and executed several small to large scale events. At my prior employer, I led Light the Night as one of the largest community initiatives to build awareness of blood cancers and raise money for research and

support with Leukemia & Lymphoma Society. Over the five years as leader, we raised \$50k for LLS. It wasn't just about the \$ raised, it was the hope on little kid's eyes when the red-light balloons rose to the sky, and they knew we were all there in our own way fighting for a cure.

I've managed teams of up to 300 FTE and budgets well over \$20 million.

Youth Services experience has been around my leadership in 4-H and I was once a Big Brother with Big Brothers Big Sisters of America. I've also taught banking 101 skills to middle schoolers and also been invited by MCWDB to present banking 101 to Cadre's within Monterey County. I've also taught banking 101 and how to build credit to over 100 high school youth at Soledad Parks and Recreation.

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 2 to 4 hours per month. Can you make that time commitment?

Yes

Membership on the Monterey County WDB requires that each member serves on a subcommittee. The time commitment for this activity ranges from a minimum of 2 to 3 hours per month. Can you make that time commitment?

Yes

Why do you wish to serve on the Monterey County Workforce Development Board?

I'd like to serve with the board to make a difference in the lives of our residents and businesses within Monterey County.

Providing skills and paths to successful employment is key to our community's success. As a hiring manager myself, finding excited and qualified talent can be challenging and expensive. I'll work from personal life experiences with other board members to exceed the board's mission and vision.

Acknowledgment

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.

MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Consider and Approve New Policy

DATE: August 28, 2025

RECOMMENDATION:

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

New Policy:

Draft #2025-08: Local ETPL Policy

Applicable to: MCWDB staff and service provider staff, MCWDB clients and prospective clients, and training providers on the Eligible Training Providers List (ETPL).

Purpose: This policy establishes types of allowable training services, consumer choice, the difference between State and Local Board requirements and procedures for initial and continued eligibility for training providers and programs, and roles and responsibilities of Local Boards and the Employment Development Department (EDD) in maintaining the integrity of the State ETPL.

Attachment:

- Draft #2025-08 Local ETPL Policy

LOCAL ETPL POLICY

EXECUTIVE SUMMARY

This policy establishes the types of allowable training services, consumer choice, the difference between the State and local Eligible Training Provider List (ETPL), the requirement for Local Workforce Development Boards (Local Boards) to establish an ETPL policy, eligibility criteria and procedures for initial and continued eligibility for Eligible Training Providers (ETP) and programs, the federally mandated Eligible Training Provider Performance Report (ETP Report), and the roles and responsibilities of the Local Boards and the Employment Development Department (EDD) in maintaining the integrity of the state ETPL.

REFERENCES

WIOA Public Law: <https://www.gpo.gov/fdsys/pkg/PLAW-113publ128/pdf/PLAW-113publ128.pdf>

WIOA Final Regulations: <https://www.dol.gov/agencies/eta/wioa/regulations>

EDD WSD 21-03, ETPL Policies and Procedures and attachment
https://edd.ca.gov/siteassets/files/jobs_and_training/pubs/wsd21-03.pdf

BACKGROUND

Each Local Board must develop local policies that provide sufficient consumer protection and oversight of training providers. These policies must meet the minimum requirements of the procedures outlined in Directive 21-03 and may include additional requirements as deemed appropriate by the Local Board.

PROCEDURAL GUIDANCE

State and Local ETPL

Local Boards and the EDD are responsible for working together to identify Eligible Training Providers (ETPs) for the state ETPL. The state ETPL creates a pool of ETPs that Local Boards can utilize to establish their local ETPL. In California, the state ETPL is called the California (CA) ETPL.

PROCEDURAL GUIDANCE

Each Local Board must maintain a local list of training providers and programs. Local Boards may add additional local requirements for providers and/or programs (except for apprenticeship programs) to be eligible on the local ETPL. Local Boards must include all CA ETPL approved apprenticeship programs on their local ETPL. Adding additional local requirements may result in providers that are on the CA ETPL but may not be eligible for inclusion on the local ETPL. While additional requirements may be added for the local ETPL, Local Boards may only include training providers on their list that are approved for the CA ETPL.

If the Local Board is reviewing provider and/or program applications for inclusion on the ETPL, the Local Board must conduct the state eligibility review first, and then determine eligibility for inclusion on their local ETPL. When conducting the state eligibility review, the Local Board must do so using only the state's requirements, and not the Local Board's additional requirements.

Local Boards that do not add additional requirements must include all of the providers/programs on the CA ETPL on their local ETPL, whereas Local Boards with additional requirements may have a subset of the state list. The Monterey County Workforce Development Board (MCWDB) local list has requirements in addition to the state list.

Consumer choice

Training services must be provided in a manner that maximizes informed consumer choice in selecting an eligible provider and program. Each Local Board must make the local ETPL available to customers. Additionally, the Local Board must make available information identifying ETPs for OJT, customized training, and IWT.

After consultation with a career planner, an individual who has been determined eligible for training services may select an ETP from the Local Board's local ETPL. Unless the program has exhausted training funds for the program year, the Local Board must refer the individual to the selected provider and establish an Individual Training Account (ITA) for the individual to pay for training. A referral may be carried out by providing a voucher or certificate to the individual to obtain training. The cost of the referral of an individual with an ITA to a training provider is paid by the applicable Adult, Dislocated Worker, or Youth program.

Local ETPL Coordinator's responsibilities

- Provide technical assistance to all training providers with programs located within the Local Workforce Development Area (Local Area) seeking to be listed on the CA ETPL.
- Review and approve or deny providers and programs for initial eligibility in a timely manner:
 - The review must include eligibility for the CA ETPL that meets requirements outlined in WSD 21-03.
 - The review must include eligibility for the local ETPL that meets requirements outlined in this Local ETPL policy.
- Review and approve or deny providers and programs for continued eligibility in a timely manner:
 - The review must include eligibility for the CA ETPL as outlined in WSD 21-03.
 - The review must include eligibility for the local ETPL that meets requirements outlined in this Local ETPL policy.
- For training providers who are deemed exempt per California Education Code (CEC) Section 94874, and are not regionally accredited by an accrediting institution:
 - Verification of the instructor's credentials or experience.
 - Ensure the financial stability of the training provider.
 - Annual inspection of the schools or training programs.
 - Ensure actual instruction is taking place.
 - Ensure instructional equipment and instruction meet current industry standards.

CA ETPL application process

For a provider to be listed on the CA ETPL, the provider must have its information entered into the CalJOBS ETPL module. It is the Local ETPL Coordinator's role to provide assistance and guidance to training providers who register in CalJOBS. Once all necessary information is entered, the Local ETPL Coordinator must review and nominate the training provider and/or program to the State ETPL Coordinator for inclusion on the CA ETPL ensuring all information provided is complete, accurate, and current, and is in alignment with WSD 21-03.

The EDD will review applications for the CA ETPL within 30 days of receipt from the Local Board.

Once the provider and/or program is approved and included on the CA ETPL, the Local Board must review and approve or deny the training provider for inclusion on their local ETPL ensuring all information is in alignment with this Local Board policy.

Timeline for initial and continued eligibility review for inclusion on the local ETPL

Initial Eligibility

CA ETPL Application Process

For a provider to be listed on the CA ETPL, the provider must have its information entered into the CalJOBS ETPL module. It is the Local ETPL Coordinator's role to provide assistance and guidance to training providers who register in CalJOBS. Once all necessary information is entered, the Local ETPL Coordinator must review and nominate the training provider and/or program to the State ETPL Coordinator for inclusion on the CA ETPL ensuring all information provided is complete, accurate, and current, and is in alignment with this Directive.

It is the policy of MCWDB to review all initial provider applications within 30 days of the provider notifying the MCWDB ETPL coordinator via email: app that the application is ready for review.

The EDD will review applications for the CA ETPL within 30 days of receipt from the Local Board. Once the provider and/or program is approved and included on the CA ETPL, the Local Board will review, and approve or deny the training provider for inclusion on their local ETPL ensuring all information is in alignment with this Local Board policy.

Continued Eligibility

Continued eligibility review for the CA ETPL must be completed annually.

It is the policy of MCWDB to review providers and programs for continued eligibility for the Local ETPL annually at the time of review for the CA ETPL.

Additional State requirements for Initial and Continued Eligibility:

The Local Board shall keep all training provider and program eligibility documents (either physical or electronic) and shall provide them to the EDD within five business days, if requested.

The Local Board shall ensure training programs lead to at least one of the following: 1) credentials and/or certificates valued by employers, or 2) training-related employment as a result of gaining measurable technical skills for a specific occupation. This requirement ensures that training programs lead to high-quality jobs, as described in the California Unified Strategic Workforce Development Plan. Job quality serves the workforce development system and broader public sector by protecting investments in training.

Please note, a program on the ETPL that only leads to employment will negatively affect a Local Board's Credential Attainment rate, since all individuals in an education or training program are included in the measure.

The Local Board shall verify and document participant attendance at regular intervals throughout the length of the training program. Per WSD19-10, the Local Board should check with the training provider to ensure clients are still in the training program each month. If not able to check monthly, the Local Board must check at least quarterly.

The Local Board shall require providers to maintain sufficient records and to make these records available for monitoring or audit by either the Local Board and/or the state.

The Local Board shall ensure there are no conflicts of interest between the Local Board and the provider, which includes, but is not limited to the following:

- A prohibition on the payment of referral fees by training providers to Local Board staff, including America's Job Center of CaliforniaSM (AJCC) operator staff.
- The Local Board shall ensure that decisions made by the Local Board regarding ETPs and their programs are in compliance with WIOA Section 107(h).

MCWDB local eligibility requirements

In addition to the State eligibility requirements outlined in WSD 21-03, the MCWDB has the following requirements:

Additional Requirements for Providers:

- It is the policy of the MCWDB that Providers must have a contract in place with the MCWDB prior to any ITA being issued for the Provider.

Additional Requirements for Programs to be listed on the MCWDB Local ETPL:

- It is the policy of the MCWDB that programs approved for the Local ETPL will
 - Include programs for training leading to employment in one of MCWDB's Priority Industry Sectors. Current Priority Industry Sectors can be found listed in the MCWDB local plan, which can be found on the MCWDB website.
 - Include programs for any training that does not result in employment in one of MCWDB's Priority Industry Sectors, but demonstrably leads to employment that meets local business needs. These programs must be authorized in writing via a waiver by the MCWDB Executive Director.
- It is the policy of the MCWDB that programs on the State ETPL that are located in other counties may be included on the MCWDB Local ETPL if they meet the other requirements listed herein.
- It is the policy of the MCWDB that programs that lead only to employment, rather than a credential as defined in WSD 23-03 "Performance Guidance", require the following to be included on the MCWDB Local ETPL:
 - Employment must be in an occupation that pays a wage that is at or greater than \$25.00 per hour.
- It is the policy of the MCWDB that programs on the Local ETPL leading to employment in one of the MSWDB's Priority Industry Sectors have a total cost no greater than \$8,000 unless a written waiver for a cost of up to \$10,000 has been approved by the Executive Director.
- It is the policy of the MCWDB that programs on the Local ETPL leading to employment not in one of the MSWDB's Priority Industry Sectors have a total cost no greater than \$5,000 unless a written waiver has been approved by the Executive Director.

Method and timeline for notifying providers if they or their program(s) are removed from the CA and/or local ETPL:

After review, if a Local Board determines the training provider/program does not meet the requirements to be listed on the CA ETPL, the Local Board must inform the training provider in writing with the reason(s) for the denial and provide information on the Local Board appeal process within 30 days of receipt of the application. A copy of the written notification provided to the provider must be uploaded to the documents section of the Provider Profile in CalJOBS within 10 business days of issuance.

If the Local Board nominates a provider/program to the state for review, but upon review, the State ETPL Coordinator denies the training provider/program listing on the CA ETPL, the EDD must inform the Local Board of the denial and the reason(s) for the denial within 30 days of receipt of the nomination. The Local Board must in

turn inform the training provider in writing with the reason(s) for the denial, and information on the Local Board appeal process within 30 days of receipt of the EDD's decision. A copy of the written notification provided to the provider must be uploaded to the document section of the Provider Profile in CalJOBS within 10 business days of issuance.

If the training provider is able to rectify the issue that caused the denial, the Local Board can review the information and resubmit to the State ETPL Coordinator for review. For example, if a provider is denied solely because the *CA ETP Assurances Form* (Attachment 4) was not uploaded to CalJOBS, the State ETPL Coordinator would notify the Local Board, which would notify the provider. The Local Board can then nominate the provider again once the form is uploaded to CalJOBS.

The training provider's request to be on the CA ETPL must be denied if the training provider fails to provide complete information, intentionally provides inaccurate information, or has substantially violated any WIOA requirement(s). If the EDD, in consultation with the nominating Local Board, determines a training provider intentionally supplied inaccurate information or violated any WIOA requirement(s), the EDD or the Local Board shall deny the training provider's application for the CA ETPL, and the training provider is not allowed to be reconsidered for inclusion on the CA ETPL for at least two years.

If approved for inclusion on the CA ETPL, but the Local ETPL Coordinator determines the training provider/program does not meet their local ETPL requirements, the Local Board must inform the training provider in writing with the reason(s) for the denial, and information on the Local Board appeal process within 30 days of receipt of the application. A copy of the written notification provided to the provider must be uploaded to the documents section of the Provider Profile in CalJOBS within 10 business days of issuance.

Appeal process:

Appeals to the WDB

Any training provider wishing to appeal a decision by the WDB must submit a written appeal within 30 days of the denial notice. The appeal must be addressed to the WDB Director, and delivered via electronic mail to avakianl@countyofmonterey.gov.

The appeal must include a statement of the desire to appeal, specification of the program(s) in question, the reason(s) for the appeal (i.e. grounds), supporting documentation, and the signature of the appropriate provider official. The training provider may choose to rely on the written appeal or an in-person appeal hearing can be scheduled.

There will be an Initial informal meeting between the Local Board staff and the provider. The purpose of this meeting is to identify if there is a simple solution to resolve the dispute.

If no resolution results from the initial informal meeting, there will be an opportunity for providers to have a hearing. The hearing officer shall be an impartial person. The hearing officer shall provide written notice to the concerned parties of the date, time, and place of the hearing at least ten (10) calendar days in advance of the scheduled hearing. Both parties shall have the opportunity to present oral and written testimony under oath; to call and question witnesses; to request documents relevant to the proceedings; and to have legal representation.

Final decisions will be made within 60 days of receipt of the appeal and the provider and the Local Board notified in writing of the final decision.

Appeals to EDD

A provider may appeal to the EDD if it has exhausted the local appeal process and is dissatisfied with the Local Board's final decision.

A provider wishing to appeal a local decision to the EDD must submit a written appeal within 30 days from a Local Board's final decision on an appeal. The request for appeal must include a statement of the desire to appeal; specification of the program in question; the reason(s) for the appeal (i.e. grounds); and the signature of

the appropriate provider official. A provider appeal should be addressed to the following:

Attn: ETPL APPEAL
Central Office Workforce Services Division, MIC 50
P.O. Box 826880
Sacramento, CA 94280-0001

The EDD will promptly notify the appropriate Local Board when the EDD receives a request for appeal and when a final decision has been rendered.

The EDD will administratively review an appeal, make a preliminary decision, and notify the provider. The EDD can either uphold or reverse the appealed decision.

Participant grievance and complaint procedure

MCWDB Grievance and complaint procedures are found in MCWDB Policy 19-01 "Grievance and Complaint Procedures," found at: [Equal Opportunity & Accessibility | Monterey County Works](#)

Recovery of WIOA training funds

MCWDB's Recovery of WIOA training funds procedures are found in MCWDB Policy 2024-02 "Individual Training Accounts," found at: www.montereycountywdb.org.

Delisting training provider/programs from the local ETPL.

To ensure the integrity of the CA ETPL, the Local Board or the EDD will remove a training provider or program from the CA ETPL at any time for the items below:

1. The training provider will be immediately removed from the CA ETPL for any of the following reasons until such time as they meet continued eligibility. A provider who has been removed from the list for any of the following reasons is liable to repay all Adult and Dislocated Worker training funds received during the period of noncompliance:
 - a. The training provider has lost its accreditation or its approval to operate from its regulating agency.
 - b. A private postsecondary training provider no longer meets the exempt criteria per CEC [Section 94874](#), or the provider's Verification of Exemption by BPPE (if required by the EDD) expired or is revoked, and the provider does not have a new Verification of Exemption, or BPPE Approval to Operate.
 - c. The nonprofit Community Based Organization no longer qualifies under Section 501(c)(3) of the Federal Internal Revenue Code.
 - d. The apprenticeship program is no longer registered with the DOL under the National Apprenticeship Act, or is no longer approved by DIR DAS. The State ETPL Coordinator is responsible for removing apprenticeship programs.
 - e. The pre-apprenticeship program no longer has a Letter of Commitment from a DOL registered or DIR DAS approved apprenticeship program, or no longer leads to an industry-recognized postsecondary credential.
 - f. It is determined the provider sub-contracted instruction of the program to another entity without approval from WASC or BPPE. See *ETPL Definitions* (Attachment 2) for the definition of third-party subcontracting.
 - g. The provider is not in compliance with WIOA Section 188.
2. A training provider will be immediately removed from the CA ETPL for a period of no less than two years for any of the reasons listed in this section. A provider who has been removed from the list for any of the following reasons is liable to repay all Adult and Dislocated Worker training funds received during the period of noncompliance:
 - a. The state identifies the Local Board and training provider are participating in pay-to-play activities (commonly known as kickbacks) that include, but are not limited to: the Local Board received monetary or gift exchanges for (or in the hope for) referrals to a specific training provider, and/or exchanges of money or gifts to have the training provider listed on ETPL. As part of the annual on-

site monitoring of Local Boards, if it is determined the Local Board is engaging in pay-to-play activities, a corrective action is required, and failure to take timely action to be in compliance may result in decertification of the Local Board involved.

- b. It is determined the training provider falsely reported information.
 - c. The training provider substantially violated a provision of Title I of WIOA, or its implementing regulations.
 - d. The training provider's top level leadership (e.g., owner, CEO, Director, etc.) is convicted of violating any federal or state law associated to the operation of the institution.
3. The EDD, in coordination with the Local Board, can remove a provider for any of the following reasons. Reactivation to the list is at the discretion of the State ETPL Coordinator and the Local Board:
- a. It is determined the provider is not serving or providing value to WIOA participants, and is listed on the CA ETPL solely for other purposes, such as the utilization of Workers' Compensation Supplemental Job Displacement Benefit vouchers.
 - b. The provider has not served at least one Title I, subtitle B enrollment during the previous two program years. See "Training Provider Continued Eligibility Criteria" for requirements to be reinstated to the ETPL.
 - c. The provider's CalJOBS profile and/or program information is inaccurate or incomplete.
 - d. The training provider has not demonstrated a good faith effort in providing the ETP Report data to the EDD.
 - e. The provider no longer wishes to be listed on the CA ETPL.
4. *In an effort to safeguard WIOA funds, the training provider will be suspended from the CA ETPL if the training provider is under any federal, state, or local investigation. During the period of suspension, no new enrollments may occur, but the training provider can continue to serve existing WIOA-funded enrollments. Once the investigation is complete, a review of the findings by the state will determine if the provider can be reinstated to the CA ETPL.*

If a training provider/program is removed from the CA ETPL, the EDD must inform the Local Board of the denial and the reason(s) for the delisting within 30 days of the removal. The Local Board must in turn inform the training provider in writing with the reason(s) for the delisting, and provide information on the Local Board appeal process within 30 days of receipt of the EDD's decision. A copy of the written notification provided to the provider must be uploaded to the document section of the Provider Profile in CalJOBS within 10 business days of issuance.

All training provider/programs removed from the CA ETPL must be removed from the local ETPL immediately upon notification from the EDD, as any new enrollments into a training program not eligible to be on the CA ETPL will result in disallowed costs.

It is the responsibility of the EDD and the Local Board to work together to ensure any participants currently enrolled in a training program removed under items 1 and 2 experience minimal disruption. If the training provider or program is removed due to items 1, 3, or 4, any participants already enrolled (attended at least one day of instruction) can continue participation in the program until the training is complete, but no new enrollments may occur.

Please see WSD19-10 for additional information regarding the recovery of training funds.

Placing Delisted Training Providers/Programs Back on the ETPL

Requests to be placed back on the CA ETPL must be submitted through the Local Board (unless the provider is a Distance Education or apprenticeship program). The training provider and program(s) must meet all criteria outlined in the CA ETPL Continued Eligibility Criteria section of this attachment to be placed back on the CA ETPL.

If the training provider is removed for item 2 of the Delisting Training Providers/Programs section of WSD 21-03, two years must have passed from the time of their removal before they can be placed back onto the CA ETPL.

If the training provider is removed for item 3(b) of the Delisting Training Providers/Programs section of WSD 21-03, the provider must wait 6 months from the date of removal before submitting an ETPL application for reinstatement.

Comparable training opportunities if the training provider goes out of business

It is the policy of the MCWDB to make every reasonable effort to provide a comparable training opportunity to participants if the training provider goes out of business. If the training provider is a Bureau of Private Postsecondary Education (BPPE) approved provider, the MCWDB will coordinate with BPPE's Office of Student Assistant Relief.

INQUIRIES

If you have questions, please contact staff at (831) 796-6434. This policy is posted on the WDB website located at: www.montereycountywdb.org.

CHRIS DONNELLY, Executive Director
Monterey County Workforce Development Board

FY 2025-26 WIOA Budget
Executive Committee: 8/28/2025
Agenda Item: 3

| 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 | | \$ 554,430 | \$ 475,127 | \$ 1,101,961 | \$ 2,131,517 |
| Total Funding | \$ 9,070,228 | \$ 2,837,975 | \$ 2,807,128 | \$ 3,425,125 | \$ 9,070,228 |
| Uses' | | | | | |
| SB 734 | | \$ 685,063 | \$ 699,601 | | \$ 1,384,664 |
| Youth WEX | | | | \$ 464,633 | \$ 464,633 |
| | | | | | \$ 7,220,931 |
| Available Funding | \$ 7,220,931 | \$ 2,152,911 | \$ 2,107,528 | \$ 2,960,492 | \$ 7,220,931 |
| 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 | \$ 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 |
| | \$ (269,304) | \$ (358,567) | \$ 50,248 | \$ 39,014 | \$ (269,304) |

Update on Fiscal Year (FY) 2024-25 Budget Closeout

The updated carry-in amount for 2025-26 is **\$2,131,517.35**, which reflects an increase from the previously projected figure of **\$2,008,885.00**. This represents a positive variance of **\$122,632.35**, primarily due to cost savings realized late in 2024-25.

Despite this improvement, it is important to note that MCWDB is still operating in a negative balance situation. However, we expect the outlook to remain stable and manageable due to ongoing salary savings. These savings are largely the result of retirements, which have reduced personnel costs more than initially projected.

Staff will continue monitoring spending and staffing closely to ensure fiscal responsibility moving forward.

Update on the Pajaro Small Business Assistance Program

Executive Director Chris Donnelly will provide a verbal update on the grant, with a written status report that will be available at the meeting.

**Discussion on Monterey County Workforce Development Board's 6th Annual
Community Builder Awards Ceremony and Sponsorships**

Operations Manager Pearl Sanchez will discuss the upcoming annual Community Builder Awards ceremony and event sponsorship levels.

WANT TO MAKE A DIFFERENCE?

**HELP US RECOGNIZE THIS YEAR'S OUTSTANDING
PARTICIPANTS, BUSINESSES, AND PARTNERS
AT THE**

6th Annual Community Builders Awards Ceremony

**DECEMBER 3, 2025
11:30AM-1:30PM**

MONTEREY COUNTY WORKS CENTER - SALINAS

BRONZE

\$125

**Organization's Name in
Program**

SILVER

\$250

**Organization's Logo in
Program**

GOLD

\$500

**Organization's Logo in
Program and Website**

PLATINUM

\$1,000

**Special Feature in Monthly
Newsletter**

**SPONSORSHIP SUBMISSION DEADLINE
NOVEMBER 26, 2025**



6th Annual Community Builders Awards Ceremony Sponsorship Selection Form

Event Date – December 3, 2025

Event Time – 11:30am-1:30pm

Event Location – Monterey County Works Center
344 Salinas Street, 2nd Floor
Salinas, CA 93901

SPONSOR INFORMATION

Name: _____ **Email:** _____

Organization: _____

Phone 1: _____ **Phone 2:** _____

SPONSORSHIP INFORMATION

Sponsorship Level:

- | | |
|---|----------------|
| <input type="checkbox"/> Bronze – Organization's Name in Program | \$125 |
| <input type="checkbox"/> Silver – Organization's Logo in Program | \$250 |
| <input type="checkbox"/> Gold – Organization's Logo in Program and Website | \$500 |
| <input type="checkbox"/> Platinum – Special Feature in Monthly Newsletter | \$1,000 |
| <input type="checkbox"/> Other – _____ | _____ |

PAYMENT INSTRUCTIONS

Please make checks payable to:

ATTN: Vanessa Kor

Central Coast Regional Workforce Partnership Inc (Tax ID No. 770235583)

344 Salinas Street, Suite 101

Salinas, CA 93901

SPONSORSHIP SUBMISSION DEADLINE

Wednesday, November 26, 2025

**Update on 4th Quarter WIOA Adult, Dislocated Worker,
and Youth Program Performance**

Operations Manager Pearl Sanchez will provide an update on performance during the 4th Quarter, including a discussion of recent process improvements and a look ahead at what the Executive Committee can expect to see in terms of WIOA performance over the current program year.

Discussion on the Eligible Training Provider List (ETPL) / On-the-Job Training (OJT) Provider Report Card

Executive Director Chris Donnelly will discuss the ETPL/OJT Provider Report Card with the Executive Committee.

ETPL Performance Overview
Title I - Adult Program
PY 24-25

Reporting Period: July 1, 2024 - June 30, 2025

| Training Provider | # Enrolled | # Completed | # Attained Credential | % Completed + Attained Credential | # In Progress | # Failed to Complete | Total Payment to Provider | # Entered Employment in Area of Training | Average Hourly Wage |
|--|------------|-------------|-----------------------|-----------------------------------|---------------|----------------------|---------------------------|--|---------------------|
| Center for Employment Training | | | | | | | | | |
| Truck Driver I | 4 | 4 | 4 | 100.00% | 0 | 0 | \$20,000.00 | 2 | \$20.50 |
| Central Coast College | | | | | | | | | |
| Medical Assistant | 8 | 0 | 0 | 0.00% | 7 | 1 | \$70,411.81 | 0 | N/A |
| Nursing Assistant | 18 | 14 | 13 | 72.22% | 0 | 4 | \$38,893.50 | 3 | \$25.29 |
| Coastal Trucking Institute, LLC | | | | | | | | | |
| Class A Truck Driver | 17 | 11 | 11 | 64.71% | 0 | 6 | \$101,480.00 | 2 | \$31.25 |
| MTS Training Academy | | | | | | | | | |
| Class B w/ School Bus or VTT Certificate | 1 | 1 | 1 | 100.00% | 0 | 0 | \$6,767.00 | 0 | N/A |
| Truck Driver Institute | | | | | | | | | |
| Class A Truck Driver | 28 | 20 | 20 | 71.43% | 1 | 7 | \$199,971.20 | 6 | \$40.13 |
| | 76 | 50 | 49 | 64.47% | 8 | 18 | \$437,523.51 | 13 | |

ETPL Performance Overview
Title I - Dislocated Worker Program
PY 24-25

Reporting Period: July 1, 2024 - June 30, 2025

| Training Provider | # Enrolled | # Completed | # Attained Credential | % Completed + Attained Credential | # In Progress | # Failed to Complete | Total Payment to Provider | # Entered Employment in Area of Training | Average Hourly Wage |
|--|------------|-------------|-----------------------|-----------------------------------|---------------|----------------------|---------------------------|--|---------------------|
| Center for Employment Training | | | | | | | | | |
| Truck Driver I | 2 | 2 | 2 | 100.00% | 0 | 0 | \$10,000.00 | 0 | N/A |
| Central Coast College | | | | | | | | | |
| Medical Assistant | 1 | 0 | 0 | 0.00% | 1 | 0 | \$10,000.00 | 0 | N/A |
| Nursing Assistant | 2 | 1 | 1 | 50.00% | 0 | 1 | \$5,475.35 | 0 | N/A |
| Coastal Trucking Institute, LLC | | | | | | | | | |
| Class A Truck Driver | 2 | 1 | 1 | 50.00% | 0 | 1 | \$16,000.00 | 0 | N/A |
| Truck Driver Institute | | | | | | | | | |
| Class A Truck Driver | 3 | 1 | 1 | 33.33% | 0 | 2 | \$20,175.20 | 1 | \$23.00 |
| | 10 | 5 | 5 | 50.00% | 1 | 4 | \$61,650.55 | 1 | |

ETPL Performance Overview
Title I - Youth N Program
PY 24-25

Reporting Period: July 1, 2024 - June 30, 2025

| Training Provider | # Enrolled | # Completed | # Attained Credential | % Completed + Attained Credential | # In Progress | # Failed to Complete | Total Payment to Provider | # Entered Employment in Area of Training | Average Hourly Wage |
|--|------------|-------------|-----------------------|-----------------------------------|---------------|----------------------|---------------------------|--|---------------------|
| Central Coast College | | | | | | | | | |
| Nursing Assistant | 6 | 5 | 2 | 33.33% | 0 | 1 | \$16,630.83 | 2 | \$26.00 |
| Lake Tahoe Community College | | | | | | | | | |
| Career Ownership, Performance, and Advancement | 5 | 5 | 5 | 100.00% | 0 | 0 | \$5,075.00 | 0 | N/A |
| Truck Driver Institute | | | | | | | | | |
| Class A Truck Driver | 1 | 1 | 1 | 100.00% | 0 | 0 | \$7,488.00 | 1 | \$23.00 |
| | 12 | 11 | 8 | 66.67% | 0 | 1 | \$29,193.83 | 3 | |

ETPL Performance Overview
Title I - Youth S Program
PY 24-25

Reporting Period: July 1, 2024 - June 30, 2025

| Training Provider | # Enrolled | # Completed | # Attained Credential | % Completed + Attained Credential | # In Progress | # Failed to Complete | Total Payment to Provider | # Entered Employment in Area of Training | Average Hourly Wage |
|--|------------|-------------|-----------------------|-----------------------------------|---------------|----------------------|---------------------------|--|---------------------|
| Center for Employment Training | | | | | | | | | |
| Truck Driver I | 3 | 2 | 2 | 66.67% | 0 | 1 | \$10,000.00 | 2 | \$20.00 |
| Central Coast College | | | | | | | | | |
| Medical Assistant | 7 | 0 | 0 | 0.00% | 7 | 0 | \$70,000.00 | 0 | N/A |
| Nursing Assistant | 18 | 14 | 13 | 72.22% | 0 | 0 | \$41,908.50 | 11 | \$20.48 |
| Coastal Trucking Institute, LLC | | | | | | | | | |
| Class A Truck Driver | 2 | 2 | 2 | 100.00% | 0 | 0 | \$16,000.00 | 1 | \$32.00 |
| Lake Tahoe Community College | | | | | | | | | |
| Career Ownership, Performance, and Advancement | 5 | 5 | 5 | 100.00% | 0 | 0 | \$5,075.00 | 0 | N/A |
| Truck Driver Institute | | | | | | | | | |
| Class A Truck Driver | 1 | 1 | 1 | 100.00% | 0 | 0 | \$7,488.00 | 1 | \$25.00 |
| | 36 | 24 | 23 | 63.89% | 7 | 1 | \$150,471.50 | 15 | |

OJT Performance Overview
Title I - Adult Program
PY 24-25

Reporting Period: July 1, 2024 - June 30, 2025

| Training Provider | # Enrolled | # Completed | # In Progress | # Failed to Complete | Total Payment to Provider | # Retained Employment Post-OJT Completion |
|------------------------------------|------------|-------------|---------------|----------------------|---------------------------|---|
| Aladdin Properties | 1 | 1 | 0 | 0 | \$8,000.00 | 1 |
| Chris Cain Law | 1 | 0 | 0 | 1 | \$1,653.24 | 0 |
| Gomez Insurance Company | 1 | 0 | 1 | 0 | \$8,000.00 | N/A |
| Hastings Construction, Inc. | 1 | 1 | 0 | 0 | \$7,999.20 | 1 |
| Illenis Care, Inc. | 1 | 0 | 0 | 1 | \$8,000.00 | 0 |
| Joby Aviation | 46 | 26 | 12 | 8 | \$249,996.52 | 32 |
| Ryken Building | 2 | 2 | 0 | 0 | \$12,359.32 | 1 |
| Surplus Services | 2 | 2 | 0 | 0 | \$15,999.83 | 2 |
| Sylvan Learning | 1 | 0 | 1 | 0 | \$8,000.00 | N/A |
| Tech Auto Repair | 1 | 0 | 1 | 0 | \$8,000.00 | N/A |
| Tejido Collective California | 1 | 1 | 0 | 0 | \$8,000.00 | 1 |
| The Crew Stucco & Plastering, Inc. | 1 | 1 | 0 | 0 | \$2,590.00 | 0 |
| | 59 | 34 | 15 | 10 | \$338,598.11 | 38 |

OJT Performance Overview
Title I - Dislocated Worker Program
PY 24-25

Reporting Period: July 1, 2024 - June 30, 2025

| Training Provider | # Enrolled | # Completed | # In Progress | # Failed to Complete | Total Payment to Provider | # Retained Employment Post-OJT Completion |
|-------------------------------|------------|-------------|---------------|----------------------|---------------------------|---|
| Carlos Perez Insurance Agency | 1 | 0 | 0 | 1 | \$85.50 | 0 |
| | 1 | 0 | 0 | 1 | \$85.50 | 0 |

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

Adult and Dislocated Worker Program

Beginning in July 2025, Equus Workforce Solutions' Adult & Dislocated Worker (ADW) program introduced an updated customer flow process designed to align services more closely with the needs of job seekers. The rollout included robust staff training with step-by-step reference materials, ensuring every team member is equipped to deliver a consistent, client-centered experience. Guided by new leadership, Equus is setting clear performance goals to improve outcomes and strengthen its role as a trusted community partner, with a focus on empowering job seekers to navigate change and achieve sustainable employment.

Launch of a New Customer Experience

The new customer journey model is a forward-looking approach that removes barriers and creates a more personalized experience for every job seeker. Guided by the updated process flow, staff has reimaged each stage of the journey as an opportunity for connection, growth, and measurable results.

- **Streamlined Entry:** Eligibility determination begins with a Welcome Call, a personalized first touch that sets expectations and builds trust.
- **Customer Discovery Day:** An interactive session that provides assessment, career exploration, and a clear path forward.
- **Dedicated Career Coach:** From day one through program follow-up, clients work with one staff member consistently, ensuring continuity and deeper engagement.

Building Pathways to Employment

This redesigned approach strengthens staff's ability to connect participants with meaningful opportunities while advancing program goals, including:

- On-the-Job Training (OJT) placements that combine income with skill development.
- Transitional Jobs that provide immediate work experience and supportive coaching.
- Training and credentials that expand long-term career pathways.
- Direct job placements through strong partnerships with local employers.

Looking Ahead

This year's transition is not only reshaping how clients are served but also how staff supports one another across all programs. By streamlining processes, clarifying staff roles, and setting performance-driven goals, Equus is building a service model that reduces barriers, strengthens accountability, and creates space for staff to fully invest in client success. The path forward is

clear: to continuously improve, remain responsive to community needs, and deliver on staff's mission of guiding every job seeker toward lasting employment and expanding opportunity.

Program Impact Spotlight

Equus staff would like to highlight the journey of Marcos Ortega, Owner of M&J Transportation.

Marcos first came to Monterey County Works in need of training and support. With guidance from staff, he earned his Class A license in August 2024 and began working as a truck driver.

In July 2025, during a routine follow-up call, staff learned that Marcos was no longer employed as a driver because he had taken the bold step of starting his own trucking business. Seeing this as an opportunity to continue supporting his success, staff scheduled a business needs assessment, provided access to the HR Hotline, assisted with job description posting, and committed to pre-screening candidates for his very first hire.

Marcos' journey represents a full-circle impact moving from a client in need of training to a business owner now partnering with Monterey County Works as an employer.

"I first learned about Monterey County Works through a friend, and I'm so grateful that I did. With their support, I was able to earn my CDL license. At first, finding a job was difficult because I didn't have enough experience, but the staff at Monterey County Works encouraged me to keep moving forward. They were always respectful, resourceful, and willing to help. Eventually, I decided to start my own business. I've gone from being a participant in program to becoming a business owner, and I'm excited to be hiring my very first employee. I'm beyond thankful for all the guidance and support I received and continue to receive from Monterey County Works."

-Marcos Ortega, Owner of M&J Transportation

Youth Programs

CaliforniansForAll Green Cadre

Equus and Turning Point are working together to provide the new CaliforniansForAll-funded Green Cadre program that began on August 11, 2025, with 26 participants ranging from 18 to 30 years old and a near-equal split between male and female participants. The first week of training was dedicated to team-building activities to foster a strong foundation for collaboration among the cohort.

Over the next two weeks, the cohort will focus on essential training and obtaining certifications required for their work, which include CPR, OSHA 10, and Food Handler Safety certifications. The ongoing success of the Green Cadre program is a testament to the continued collaboration with MCWDB's valued partners: Pacific Grove Community Garden, Monterey Adult School, RCDMC, Blue Zones, the City of Monterey, the Food Bank for Monterey County, and the California State Parks.

The City of Monterey contacted the Green Cadre staff for an employment referral that resulted in a previous Green Cadre participant being hired by the City of Monterey as a Parks Maintenance Worker, underscoring the effectiveness of our program in preparing young adults for gainful employment and demonstrating the value our graduates bring to our partner organizations.

JOBY Technology Cadre

The Technology Cadre with Joby Aviation ended on August 8, 2025. Katherine, a participant in this summer's program, achieved full-time employment with Joby as an Airframe Assembly Technician I. Two other JOBY participants completed their work experience internship and have decided to pursue higher education.

Hospitality Cadre

One of the Hospitality Cadre participants who graduated in May has been offered direct employment with Kona Steak and Seafood and is anticipated to begin after her work experience contract ends. Other participants are returning to education or actively looking for employment.

Updates on Executive Committee Members' Workforce and Business Activities

Committee members will provide updates on their recent workforce and business activities.