



EXECUTIVE COMMITTEE MEETING AGENDA PACKET

Thursday, April 16, 2026
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) 796-3331
www.montereycountywdb.org

WDB Executive Committee:

Erik Cushman,
WDB & Executive Chair

Cesar Lara
Paula Calvetti
Larry Hartman

Monterey County Workforce Development Board Executive Committee Meeting

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

Thursday, April 16, 2026; 9:00 a.m.

AGENDA

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: State of California Employment Development Department (EDD) 2024-25 Annual Monitoring, Final Report	Chris Donnelly
CONSENT CALENDAR:	Erik Cushman
1. ACTION: Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) Special Executive Committee meeting on February 12, 2026.	Erik Cushman
DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS:	Erik Cushman
1. ACTION: Consider and approve staff's sole source recommendation for the 2026-27 provider of Workforce Innovation and Opportunity Act (WIOA) One Stop Operator services and forward it to the full Board for agreement.	Chris Donnelly
2. ACTION: Consider and approve staff to submit a request to the State EDD to transfer \$900,000 of WIOA funding from the Dislocated Worker to the Adult program.	Daisy Fernandez
3. ACTION: Consider and approve the following policy: <ul style="list-style-type: none"> 2026-03 Individual Training Accounts (ITA) Policy 	Chris Donnelly
4. ACTION: Consider and approve staff to execute a new, three-year website development, hosting, and maintenance agreement with Pat Davis Design Group in an amount not to exceed \$57,000 for the period from July 1, 2026, through June 30, 2027.	Chris Donnelly
5. ACTION: Consider and approve MCWDB's 2026-2028 Strategic Plan.	Chris Donnelly
6. Discussion on the recruitment of a private sector Board member from the Healthcare industry.	Erik Cushman
7. Discussion on the 2026 Local and Regional WIOA Contractor List Request for Qualifications (RFQ).	Chris Donnelly
8. Discussion on the timeline for Youth and Adult/Dislocated Worker services Requests for Proposals (RFPs).	Chris Donnelly
9. Update on MCWDB's 2025-26 3 rd Quarter budget.	Daisy Fernandez
10. Update on Building and Construction Trades Pre-Apprenticeship program.	Chris Donnelly
11. Update on WIOA Adult, Dislocated Worker, and Youth programs.	Lucy Iracheta Lourdes Luviano Lauren Walters
12. Updates on Executive Committee members' workforce and business activities.	Erik Cushman
ANNOUNCEMENTS:	Erik Cushman
ADJOURNMENT	Erik Cushman
SUBCOMMITTEE MEETINGS: Executive: MAY 21, 2026	WDB MEETING APRIL 23, 2026 Erik Cushman



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UNADOPTED MINUTES

**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, February 12, 2026

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

Members Absent: None

Staff Present: Christopher Donnelly, Elizabeth Kaylor, Pearl Sanchez, Daisy Fernandez, and Vanessa Kor

Public Comment: None

Call to Order/Introductions: Erik Cushman called the meeting to order at 9:15 a.m. A quorum was established.

Changes to Agenda: None

Director's Report: Executive Director Chris Donnelly reported to the Executive Committee on Department of Labor, Workforce Innovation and Opportunity Act (WIOA) funding and on the release of the WIOA One Stop Operator Request for Proposals (RFP).

CONSENT CALENDAR:

1. **Action:** Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) Executive Committee meeting on January 15, 2026.
A motion was made by Cesar Lara to approve the minutes for the Executive Committee meeting on January 15, 2026, seconded by Paula Calvetti. Motion passed.

Discussion or Review of Business Calendar Action Items:

1. **ACTION:** Consider and approve the reappointment of Erik Cushman, representing Business, for a three-year term, and that the MCWDB forward the reappointment to the Board of Supervisors for final approval.
2. **ACTION:** Consider and approve the reappointment of Efrain Aguilera, representing Labor, for a three-year term, and that the MCWDB forward the reappointment to the Board of Supervisors for final approval.
3. **ACTION:** Consider and approve the reappointment of Arpi Tanilian, representing Business, for a three-year term, and that the MCWDB forward the reappointment to the Board of Supervisors for final approval.
4. **ACTION:** Consider and approve the reappointment of Justin McIntire, representing California's Department of Rehabilitation, for a three-year term, and that the MCWDB forward the reappointment to the Board of Supervisors for final approval.
A motion was made by Cesar Lara to approve Items 1 through 4 on the Business Calendar, seconded by Paula Calvetti. Motion passed.
5. **ACTION:** Consider and approve WDB Policy #2026-01, Supportive Services Policy and Guidance.
A motion was made by Cesar Lara to approve WDB Policy #2026-01, Supportive Services Policy and Guidance, seconded by Paula Calvetti. Motion passed.
6. The Executive Committee welcomed its new member, Larry Hartman.
7. The Executive Director provided an update on the CWDB Executive Director's visit to the workforce development boards of the Central Coast.
8. The Executive Director discussed MCWDB's 2026-2028 Strategic Plan with the Executive Committee.
9. Management Analyst Elizabeth Kaylor provided implementation information on Assembly Bill (AB) 339.
10. The Executive Director discussed AB 642, State Rapid Response legislation, and provided an update on local Rapid Response activities.
11. Management Analyst Vanessa Kor provided an update on the Pajaro Business Relief Program.
12. Finance Manager Daisy Fernandez provided an update on MCWDB's 2025-26 2nd Quarter budget.
13. Lucy Iracheta from Equus's Adult/Dislocated Worker program, Lourdes Luviano from Equus' Youth program, and Michael Artalejo from Turning Point's Youth program provided updates on the WIOA Adult, Dislocated Worker, and Youth programs.
14. Management Analyst Vanessa Kor provided an update on WIOA Adult, Dislocated Worker, and Youth program performance.

15. Updates on Executive Committee members' workforce and business activities were postponed to a future meeting.

Adjournment: Chair Erik Cushman adjourned the meeting at approximately 10:50 a.m.



MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: RFP #10976 Sole Source Recommendation

DATE: April 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board (MCWDB) Executive Committee:

1. Approves staff's recommendation to execute an agreement with Arbor E&T, doing business as Equus Workforce Solutions, to provide WIOA One Stop Operator services in Monterey County for the period from July 1, 2026, through June 30, 2027, for an amount not to exceed \$135,000; and
2. Forwards the recommendation to approve Equus Workforce Solutions to the full board for consideration at its meeting on April 23, 2026.

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 for coordinating 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 Area: here, the Board of Supervisors.

Arbor E&T, doing business as ResCare and subsequently as Equus Workforce Solutions, has provided WIOA One Stop Operator (OSO) services to the MCWDB since the 2017 OSO Request for Proposals (RFP) selection committee recommended executing an agreement with Arbor E&T in an amount not to exceed \$125,000 for the period from January 1, 2018, through June 30, 2019, with three annual amendments on substantially the same terms. This recommendation was subsequently approved by the Board of Supervisors on January 9, 2018.

When MCWDB issued a new OSO RFP in 2022, Arbor E&T provided another competitive proposal for WIOA OSO services, was recommended by the RFP selection committee to provide these services for an amount not to exceed \$125,000, and was approved by the Board of Supervisors on September 27, 2022, to sign a new agreement and future amendments on similar terms, provided that the agreement's performance objectives are met and WIOA funding continues to be available. For 2024-25, the annual contract amount was increased to \$135,000.

DISCUSSION:

The WIOA One Stop Operator Services RFP was released on February 12, 2026, with a submittal deadline of March 6, 2026, and a responsive proposal was received from Arbor E&T's Equus Workforce Solutions to provide One Stop Operator services for the America's Job Centers of California (AJCCs) in Monterey County. Equus' proposal was received by the submittal deadline, but no other proposals to serve Monterey County were received.

According to the MCWDB's adopted policy on Procurement Standards, it may procure goods and services without competition under certain limited circumstances. Per the One-Stop Comprehensive Financial Management Technical Assistance Guide issued by the U. S. Department of Labor, the purchase must be unfeasible using other procurement methods and may be used when a competitive process yields an insufficient number of bidders (fewer than two).

MCWDB is interested in providing continuous WIOA One Stop Operator services in Monterey County and believes that if it were to take another three to four months to conduct an additional WIOA OSO RFP process, the interruption to its contracted One Stop Operator services would lead to lower customer satisfaction levels for WIOA participants and the general public with no guarantee of additional responsible bidders.

If the MCWDB approves a sole source recommendation to award a new contract to Equus for One Stop Operator services, it will maintain documentation for the non-competitive, sole source purchase including:

- A WDB staff report providing the reason(s) for selecting the sole source method, explaining why competitive procurement is unfeasible, and which additional sole source condition applies, if any.
- The estimate of the potential purchase price.
- A copy of the unsuccessful RFQ/IFB/RFP and responses submitted.
- A determination of *the responsibility of the selected provider* and cost analysis.
- Why the provider was selected.
- A copy of Monterey County WDB meeting minutes indicating approval of the sole-source procurement.
- A copy of the award documents and resulting contract.

In its Contracts/Purchasing manual, the County of Monterey defines a *responsible bidder* as "A bidder whose bid conforms in all material respects to the terms and conditions, the specifications, and other requirements of the solicitation." Here, WDB staff has provided an analysis of Equus' proposal to determine bidder responsibility and ensure that Equus' proposal materially conforms to the requirements of the RFP.

Contractor Qualifications and Staff Observations

The following information is based on WDB staff's proposal review.

Equus Workforce Solutions has over 50 years of workforce development experience, serving as a contractor and grant recipient for federal, state, and locally funded workforce initiatives. Currently, Equus holds 27 One Stop Operator contracts nationwide, providing a broad perspective on effective system operations across diverse workforce regions. The national footprint enables Equus to identify emerging best practices, adapt innovative service delivery models to local conditions, and implement creative solutions with hybrid and distributed staffing environments.

Quality of Design (50 points)

The proposal narrative is highly detailed and thoroughly discusses most aspects of Equus' comprehensive and responsive approach to providing the OSO services specified in the RFP. The proposal emphasized Continuous Quality Improvement (CQI), including ongoing assessment of operational performance, service delivery, and certification readiness.

In addition, Equus' proposal focused on partner education and general workforce system coordination and modernization. Equus integrates innovative, user-centered tools to enhance access, engagement, and service coordination – tools such as Level All, an online training tool that provides career and college guidance, resume development resources, financial literacy training, and information on 135 careers in both English and Spanish. Another tool, EQ Career Connect powered by Employable Me, delivers customized resources to support education, skills development, and employment pathways.

Equus' accessibility Quality Management Tool (QMT) verifies availability and functionality of assistive technologies, auxiliary aids, staff training on accommodations, interpreter service postings including sign language assistance, and direct linkage methods including phone, online chat, and teleconference access to partners.

Finally, Equus' national Operational Excellence (OpEx) Team, composed of experienced workforce development leaders, partners with local operations to implement documented quality review processes, reinforce consistent practices across service locations, and drive improvement based on performance data. Equus is also able to leverage its established OSO Community of Practice, coordinated monthly by a national One Stop Operations leader, to share best practices, disseminate policy updates, support peer-to-peer problem solving, provide mentorship opportunities, and generally ensure consistency across operations.

Agency's Organizational and Financial Proposal (35 points)

With its network of workforce and economic mobility partners, Equus collaborates to advance participant outcomes and the quality of the local workforce system. As OSO, Equus provides ongoing education and technical assistance to promote shared understanding and application of AJCC requirements, such as certification standards, EO and ADA compliance, customer service expectations, data integrity, and day-to-day operational protocols. Partner education includes cross-training sessions conducted at least quarterly, comprehensive standard operating procedures and guidance documents, policy update briefings, and targeted one-on-one technical assistance.

Based on its local experience, Equus supports enforcement of procedural, conduct, and appearance standards governing AJCC operations through monitoring, documentation, and coordination with partner leadership. Standards are reinforced through routine observation and Quality Monitoring Tool reviews to assess adherence to established policies while supporting continuous improvement.

Equus brings national experience leading and supporting CQI programs across AJCC systems. Our system-wide CQI approach is built on standardized tools, scheduled operational reviews, and structured corrective action planning designed to drive system improvement and partner accountability. In Monterey County, customer satisfaction feedback is assessed through quarterly surveys. CQI activities, performance monitoring, customer feedback analysis, and corrective action follow-up are integrated into governance and partner meetings and reported to MCWDB leadership.

Performance Standards and Data Collection (15 points)

Equus has used state and proprietary case management systems comparable to CalJOBS throughout its projects nationwide, including working with America's One-Stop Operating System (AOSOS), maintains a local customer satisfaction rate averaging approximately 95%, and uses various tools to connect program participants and the public with labor market information relevant to their job search.

Based on the information above, staff recommends that Equus Workforce Solutions be approved to provide WIOA One Stop Operator services for 2026-27.

NEXT STEPS:

The recommendation of the Executive Committee will be forwarded to the full board for consideration at its meeting on April 23, 2026. The recommendation will then be forwarded to the Board of Supervisors for approval.

MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Daisy Fernandez

SUBJECT: Approval of Dislocated Worker to Adult Program
Funding Transfer

DATE: April 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board (MCWDB) Executive Committee approves staff to submit a request to the State Employment Development Department (EDD) to transfer \$900,000 of Workforce Innovation and Opportunity Act (WIOA) Dislocated Worker program funding to the WIOA 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 100% of funds between the 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) 2025–26 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 February 28, 2026, the Adult program has expended \$1,013,522.83 and has additionally obligated \$751,591.55 for case management contracts. In order to sustain this heightened level of service delivery, a transfer of \$900,000 from the Dislocated Worker program to the Adult program is recommended.

A proposed funding utilization plan is expected to be provided to the full Board in advance of the April 26, 2026, Board meeting, with copies available at the time of the meeting.

NEXT STEPS:

If approved, staff will submit a WIOA funding transfer request to the State EDD for its approval.



MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Consider and Approve Revised Policy

DATE: April 16, 2026

RECOMMENDATION:

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

Revised Policy:

Draft #2026-03: Individual Training Accounts (ITA) Policy

Applicable to: MCWDB staff and service provider staff.

Purpose: This policy provides guidelines for implementing Individual Training Accounts that set the maximum duration and training dollar amount for individuals funded through WIOA and non-WIOA programs provided by the MCWDB.

Attachment:

- Draft #2026-03: Individual Training Accounts (ITA) policy

INDIVIDUAL TRAINING ACCOUNTS

EXECUTIVE SUMMARY

The purpose of this policy is to provide guidelines for implementing Individual Training Accounts (ITAs) that are flexible and maximize informed customer choice in the selection of an eligible training provider. This policy sets the maximum ITA duration and training dollar amount for individuals funded under the WIOA/non-WIOA programs provided by the Monterey County Workforce Development Board (WDB). This policy emphasizes support for training in the local high demand/high growth industries identified by the WDB. Training services may be made available to WIOA Title I Adults, Dislocated Workers and Out-of-School Youth (ages 18-24) and non-WIOA participants who have met eligibility requirements.

REFERENCES

WIOA Section 134(c)(3); Title 20 Code of Federal Regulations (CFR) Sections 680.200-230, Training Services; Title 20 CFR Sections 680.300-350, Individual Training Accounts; Title 20 CFR Sections 680.400-530, Eligible Training Providers; Title 20 CFR Section 680.310, Amount or Duration Limits on ITAs; Title 5 California Code of Regulations Article 1 of Chapter 1 of Division 7.5 Section 70000 Employment Development Department (EDD), Workforce Services Directive (WSD) 25-02, California Eligible Training Provider List; EDD WSD18-10, WIOA Training Expenditure Requirement; Training and Employment Guidance Letter (TEGL) 19-16, Guidance on Services Provided Through the Adult and Dislocated Worker Programs under WIOA; TEGL 21-16, Third WIOA Title I Youth Formula Program Guidance.

BACKGROUND

All local WDBs, as recipients of WIOA Title I funds, are charged with ensuring that all expenditures have been made in accordance with cost limitations specified in the WIOA and its regulations. WIOA and non-WIOA subrecipients are also required to have a process or procedure in place for funds expended on training and the recovery of unused or unexpended training monies, and/or tuition refunds. The following operational guidance is established for WIOA/non-WIOA service providers (case managers) to determine if a participant is eligible for an ITA and provide the process for developing, reviewing/approving, tracking, amending, and de-obligating ITAs.

For the purpose of this policy, the Monterey County WDB has established an ITA funding limit of up to \$8,000 per person (with a waiver, up to \$10,000) for participants determined eligible and suitable for training services in the WDB's priority industry sectors (Agriculture; Finance, Insurance, and Real Estate; Tourism & Hospitality; Health & Social Assistance; Logistics & Transportation; and Construction), and \$5,000 for training in occupations outside of these industry sectors, for a duration of up to eighteen (18) months. The training must lead to employment wages of at least \$19 per hour.

An ITA is designed to provide services to participants who are in need of training that prepares them for employment in in-demand occupations within the Monterey County local area. WIOA-funded participants may access occupational skills training services a maximum of once every three (3) years through training providers who have met eligibility requirements set by the State of California Employment Development Department to be listed on the Eligible Training Provider List (ETPL).

It is anticipated that all training completions shall lead to, and provide participants with, one or more of the following:

- An industry recognized post-secondary credential, secondary school diploma or its equivalent, national or state certificate or degree, including all industry appropriate competencies, licensing and/or certification requirements; and/or
- Employment.

This ITA operational guidance is designed to ensure consistency among training providers and streamline the process for participants to obtain an ITA while ensuring that the requirement for “informed customer choice” is still being met.

PROCEDURAL GUIDANCE

The following must be adhered to prior to authorization of training for WIOA/non-WIOA clients. Staff shall use the Individual Training Account (ITA) Checklist (Exhibit A) to ensure that ITA paperwork is completed and/or is being tracked for any waivers, amendments, or de-obligations.

I. Identification of the Need for Training:

Training services may be provided if WIOA/non-WIOA service provider counselors (case managers) determine, after an interview, comprehensive and specialized assessments (including WorkKeys); completion of an Individual Employment Plan (IEP) for adults/dislocated workers or Individual Service Strategy (ISS) for out-of-school youth (ages 18-24); and career planning, that the individual:

- a. Is unlikely or unable to obtain or retain employment that leads to economic self-sufficiency, or wages comparable to or higher than wages from previous employment through provision of career services alone;
- b. Is in need of training services to obtain or retain employment that leads to economic self-sufficiency, or wages comparable to or higher than wages from previous employment, through provision of career services alone; and
- c. Has the skills and qualifications to successfully participate in the selected program of training services.

II. Training Readiness Requirements:

1. **Labor Market Research** – Training services must be linked to in-demand employment opportunities in the local area. Participants seeking training must conduct in-depth labor market research in the area that they are interested in attending training to ensure their knowledge of the market for their contemplated occupation and how the training will increase their earning potential. Participants must complete the Labor Market Research Form provided as Exhibit B to this ITA policy to be eligible for training.
2. **Informed Customer Choice** – Prior to being approved for training, participants must review the ETPL, research the trainings that are linked to the in-demand occupations of interest and assess the performance of relevant training providers listed on the ETPL in CalJOBS.

Participants shall complete research on two training providers using the internet and document the information on the attached Training Program & Provider Research Form (Exhibit C). If attending classroom training in the Monterey County local area, participants will be required to complete a

physical site visit to a minimum of two training providers to determine if the facilities are adequate and accessible. The participant must consider transportation, classroom setting, and if applicable, necessary accommodations for persons with disabilities. Research may be conducted at just one training provider at the discretion of the WIOA/non-WIOA service provider (case manager) to streamline the ITA process, if only one training provider is listed on the ETPL.

It is also strongly recommended that participants contact at least one business to inquire about the opportunity to obtain employment with the business upon completion of the chosen training program. Participants must determine whether the selected training program meets all employment requirements, (e.g., credentialing, internship, skill standards, etc.).

3. **WorkKeys Assessments** – Participants' WorkKeys core assessments (Applied Math, Graphic Literacy, and Workplace Documents) must be completed prior to training. To be considered for training, a participant must score at least a level 3 on all three WorkKeys core assessments. Career Ready 101 pretests may be administered to pre-screen the readiness of a participant to take the WorkKeys core assessments. Career Ready 101 online training may also be provided to participants to help improve their scores.
4. **Prevocational/Job Readiness Training** – Prior to enrollment in long-term occupational skills training, participants must first work with their case manager(s) to complete a short-term online training program provided by Metrix Learning in the area of their training. Participants must complete a Pre-Vocational /Job Readiness Online Training Form to show the connection between their pre-vocational/job readiness skills training and their occupational skills training (Exhibit D).
5. **Financial Assistance** – All other training options and funding sources shall be exhausted prior to utilizing WIOA/non-WIOA training funds. Efforts to first utilize Pell grants and other "need based" fiscal resources, as well as supportive services from partnership agencies, should be made prior to the request for WIOA/non-WIOA training funds.

Case managers shall work with participants to complete a Budget form (Exhibit E) to determine if other training options and funding sources are considered and exhausted prior to utilizing WIOA/non-WIOA training funds, and if applicable, completion of the FAFSA online www.fafsa.ed.gov to determine whether participants are eligible for financial aid, such as Pell grants.

Supportive services may be available to adult and dislocated worker individuals participating in WIOA career services or training activities that are unable to obtain supportive services through other programs providing such services. Additionally, supportive services must be necessary to enable the individual to participate in career services or training activities.

For out-of-school youth (ages 18-24), supportive services may be available during program participation to enable an individual to participate in WIOA youth program activities. Supportive services may also be provided to youth during the follow-up period.

Supportive services may include but are not limited to: assistance with State-licensed child care and dependent care; assistance with transportation; assistance with emergency housing; assistance with uniforms or other appropriate work attire and work-related tools; referrals to healthcare; and linkages to community services.

III. **CalJOBS Training Application, Enrollment & Documentation:**

Upon identification of the need for training and completion of the training readiness requirements listed above, the following steps must be completed prior to the submission of an ITA to the WDB Fiscal staff for review and approval:

1. **Participant Training Commitment Form** – Participants must agree to and sign this form (Exhibit F) and must provide information on their labor market and training program/provider research.
2. **Master Agreement and Authorized Signature Form** – The case manager shall verify that the

selected training provider has a signed, active Master Agreement and Authorized Signature Form on file with the WDB. The WDB's ETPL coordination is currently being provided by the WDB's Operations Manager, Pearl Sanchez, who can be reached at (831) 755-3240 or by email at SanchezP4@countyofmonterey.gov.

3. **CalJOBS Training Application, Activities and Case Notes** – The case manager shall review participant's WIOA/non-WIOA training application to ensure that it is complete and accurate in CalJOBS and shall enter the appropriate activity codes into CalJOBS (including case notes for each service/activity)

NOTE: All CalJOBS activities/services and case notes must be entered in the CalJOBS system within 3 days of the interaction between WIOA/non-WIOA service provider (case manager) and participant.

IV. ITA Authorization Approval: The following general rules, sequence and timeline must be followed to ensure adequate review time prior to final approval of all ITA Contracts and Invoices:

1. ITA General Rules

- a. All ITA Contract documents (Exhibits G-1 through G-3) must be completed and approved prior to commencement of any training program.
- b. All ITA Contract documents must be submitted to the WDB Fiscal staff via email for review and approval to obligate funds, at least ten (10) days prior to the start of training.
- c. Under no circumstances will the participant begin training without an approved and signed ITA Contract in place.
- d. No ITA Contract will be issued, approved or paid retroactively for any WIOA participant previously enrolled in training by an ETPL training provider, prior or concurrently to their enrollment into a WIOA/non-WIOA program.
- e. The maximum dollar limit for training is \$8,000 (with a waiver, up to \$10,000) for occupations in the WDB's priority industry sectors (Agriculture; Finance, Insurance & Real Estate; Tourism & Hospitality; Health & Social Assistance; Logistics & Transportation; and Construction), and \$5,000 for training in occupations outside of these industry sectors. This amount must be used for tuition-related fees and other costs, such as: books, licenses, tools, equipment, safety gear, drug testing, testing and/or certification fees, student association fees, and uniforms.
- f. The duration of training shall not exceed eighteen (18) months.

Any exceptions to the general rules stated above must have the approval of both the WDB Finance Manager and the WDB Executive Director and may only be granted on a case-by-case basis due to extreme financial hardship, following the ITA Waiver process under Section V of this policy.

2. ITA Sequence and Timeline

- a. **ITA Contract and Invoices** – must be completed and emailed to the WDB Fiscal staff a minimum of ten (10) days prior to the start date of training at 567-WDB-Fiscal@countyofmonterey.gov.
- b. **WDB Fiscal Manager Pre-Approval & Obligation** – Within two (2) working days upon receipt of the ITA Contract and Invoices, the WDB Fiscal staff shall review and approve the contract, obligate the funds for training, and return the contract to the originating WIOA/non-WIOA service provider (case manager) via email, confirming approval of the ITA Contract.

In the event that the ITA Invoices are missing information, the WDB Fiscal Manager shall return the ITA Invoices to the originating WIOA/non-WIOA service provider (case manager) with an explanation listing the specific reason(s) for the return.

- c. **WIOA/non-WIOA Supervisor and ETPL Training Provider Approval** – Upon receipt of the pre-approved ITA, the WIOA/non-WIOA service provider (case manager) shall forward a PDF of the ITA Contract and Invoices to the WIOA/non-WIOA supervisor and ETPL training provider for approval, then return the signed ITA Contract to the WDB Fiscal staff via email within two (2) working days at 567-WDB-Fiscal@countyofmonterey.gov.
- d. **WDB Fiscal Staff Final Approval** – Within two (2) working days upon receipt of an ITA Contract, the WDB Fiscal staff will review and approve/deny the ITA Contract and notify the WIOA/non-WIOA service provider (case manager) if the ITA Contract has been approved or denied.

V. ITA Waivers:

An ITA Waiver (Exhibit G-4) must be completed and submitted to the WDB Fiscal Manager by the case manager when a participant is having difficulties meeting the training readiness requirements or other ITA requirements/limits:

1. WorkKeys scores are below level 3;
2. Requesting an exception to the \$8,000 training limit (up to \$10,000) for WDB priority industry sector training;
3. Requesting an exception to the \$5,000 training limit for training not in WDB priority industry sectors;
4. Justification(s) for multiple ITAs within a 3-year period; or
5. Other (e.g., not meeting the 10-day submission timeline, requesting exception to the 18-month training duration cap, etc.).

An anticipated employment wage of at least \$22 per hour is required for a waiver of the \$8,000 training limit.

Within two (2) working days upon receipt of the ITA Waiver and Contract, both the WDB Fiscal Manager and WDB Executive Director (or the WDB Executive Director's designee) will review and approve/deny the ITA Waiver, and the WDB Fiscal Manager shall notify the WIOA/non-WIOA service provider (case manager) if the ITA Waiver has been approved or denied.

An Amendment to the ITA Contract (Exhibit G-5) may be needed when a training program or provider is removed from the ETPL or changed to inactive, or when extraordinary program expenses develop, the participant and WIOA/non-WIOA service provider (case manager) must agree on whether to complete the plan of training with the existing provider, seek a similar program, or discontinue training. When a program of training is removed from the state ETPL, participants in that program can complete their training. However, an ITA should not be modified or extended for a participant beyond the original plan approval as it relates to a program of training that is no longer on the ETPL.

The ITA Waiver must be approved and signed by the WIOA/non-WIOA service provider (case manager) and WIOA/non-WIOA Program Manager and then submitted to the WDB Fiscal Manager with the ITA Invoice. Within two (2) working days upon receipt of the ITA Waiver and ITA Invoice, both the WDB Fiscal Manager and WDB Executive Director, or the WDB Executive Director's designee, will review and approve/deny the ITA Waiver and notify the WIOA/non-WIOA service provider (case manager) if the ITA Waiver has been approved or denied.

No hand-written alterations will be allowed on the ITA Invoices. Altered ITA Invoices will be returned and not processed. Any modifications to the ITA should be documented in a case note in CalJOBS.

VI. ITA Deobligations:

In the event that the ITA Contract needs to be deobligated, an ITA Deobligation with justification explaining the reason for the deobligation must be completed, signed and submitted to the WDB Fiscal Manager with the ITA Contract (Exhibit G-6).

VII. Cancellation and Refunds:

"Cancellation" means ending a student's enrollment in an educational program before the completion of the cancellation period, and "Cancellation Period" means the period from signing the enrollment agreement through either the student's attendance at the first session of class or the seventh business day after enrollment, whichever is later.

"Refund" means a repayment owed to a student or the WDB after the closure of the institution; or a student's cancellation, withdrawal, completion of either the period of attendance or educational program; or the discontinuation or cancellation of the educational program.

(a) Upon cancellation of enrollment in an educational program, the Training Provider shall make refunds of payments made prior to cancellation that are no less than the refunds required under the California Private Postsecondary Education Act of 2009, ("Act"), and the Bureau of Postsecondary Private Education, and shall not enforce any refund policy that is not specified in the school's catalog as required pursuant to Section 94909(a)(8)(B) of the California Code of Regulations ("Code").

(1) Student cancellations shall be noticed in writing as required by Sections 94919(b) and 94920(a) of the Code.

(A) Training Provider shall refund 100% of the amount paid for institutional charges, less a reasonable deposit or application fee not to exceed two hundred fifty dollars (\$250), if notice of cancellation is made through attendance at the first class session, or the seventh calendar day after enrollment, whichever is later.

(B) If Training Provider provides a 100% refund pursuant to Sections 94919(d) or 94920(b), any Student Tuition Recovery Fund assessment paid pursuant to Section 94924 of the Code shall be refunded. (2) If Training Provider's educational program is discontinued or canceled or Training Provider closes prior to completion of the educational program, Training Provider shall provide refunds to students pursuant to Section 94927 of the Code.

(b) If Training Provider has collected money from, or on behalf of, a student for transmittal on the student's behalf to a third party such as the WDB for a bond, library usage, or fees for a license, application, or examination and Training Provider has not paid the money to the third party (WDB) or has not yet been billed or invoiced by the third party at the time of the student's cancellation, Training Provider shall refund the money to the student or third party such as the WDB within 45 calendar days of the student's cancellation.

(c) Training Provider shall provide a refund within 45 calendar days after the date of cancellation of a student's enrollment from the educational program in which the student was enrolled, and shall provide the student with documentation specifying the amount of a refund, the method of calculating the refund, the date the refund was made, and the name and address of the person or entity to which the refund was sent, as described in Section 71920(b)(10).

If a refund is made to a third party such as the WDB on behalf of a student who has cancelled their enrollment in an educational program, Training Provider shall provide the student, within 45 calendar days after the date of cancellation, a written notice, as described in Section 71920(b)(10), in hard-copy or electronic format, itemizing the amount refunded to each third party (WDB), the name of the third party, and the date of each refund, as applicable.

(d) Training Provider shall maintain a log, kept current on a monthly basis, in an electronic version or hardcopy of all student cancellations. The log shall include the names, addresses, telephone numbers, personal email addresses, dates of cancellations, and refund amounts of all students who have cancelled the enrollment agreement with Training Provider during the calendar year.

Note: Authority cited: Sections 94803, 94877, and 94885 and 94927, Education Code. Reference: Sections 94885, 94919, and 94920 and 94924 (Education Code).

VIII. Withdrawals and Refunds:

“Withdrawal” means the ending of a student’s enrollment in an educational program after the completion of the cancellation period but prior to their completion of the program.

(a) For purposes of determining a refund under the Act and the BPPE, the following shall apply to any student who has either submitted a written statement of withdrawal to an institution or has received a written statement of withdrawal from the institution in accordance with the withdrawal policy stated in the institution’s catalog pursuant to Section 94909(a)(8)(B) of the Code.

(1) Training Provider’s withdrawal and refund policies and procedures for withdrawals effectuated by a student shall include, at a minimum:

- (A) A statement that withdrawal may be effectuated by the student’s written notice;
- (B) The acceptable method(s) of delivery of a student’s notice to withdraw;
- (C) The office(s) or person(s) to whom the notice to withdraw must be delivered;
- (D) The date that the notice to withdraw is considered effective, which shall be no later than the date received by Training Provider.

(2) Training Provider’s withdrawal and refund policy and procedures for student withdrawals effectuated by an institution shall include, at a minimum:

- (A) A statement that withdrawal shall be effectuated by Training Provider’s written notice regarding the student’s conduct, including, but not necessarily limited to, a student’s lack of attendance;
- (B) The conditions under which a student may be withdrawn for conduct reasons;
- (C) The maximum number of consecutive class days a student may be absent before being deemed withdrawn by Training Provider;
- (D) The date that the notice to withdraw is considered effective. If an institution withdraws a student for lack of attendance, the date of notice to withdraw shall be the student’s last date of attendance.

(3) A pro rata refund pursuant to Section 94919(c) or 94920(d) or 94927 of the Code shall be no less than the total amount owed by the student for the portion of the educational program provided subtracted from the amount paid by the student, calculated as follows:

- (A) The amount of the refund owed to the student equals the total charges paid by or on behalf of the student, minus the daily or hourly tuition charge for the program (total institutional charge minus any non-refundable charges, divided by the number of days or hours in the program), multiplied by the number of days or hours the student attended prior to withdrawal, and minus any non-refundable charges. Any hours or days prior to the student’s last day of attendance for which the student was scheduled to attend but was absent shall be included in the calculation of days or hours attended.
- (B) All amounts that the student or a third party such as the WDB has paid shall be subject to pro rata refund unless the enrollment agreement and the refund policy outlined in the catalog specify a non-refundable deposit or application fee, not to exceed two hundred fifty dollars (\$250), or non-refundable amounts paid for educational materials, or both. The enrollment agreement and catalog shall specify whether and under what circumstances the amounts paid for educational materials are non-refundable.
- (C) Except as provided for in subdivision (a)(3)(B) of this Section, all amounts paid by the student in excess of what is owed as calculated in subdivision (a)(3)(A) shall be refunded.
- (D) If Training Provider provides a pro rata refund pursuant to Sections 94919(c) or 94920(d) of

the Code, any Student Tuition Recovery Fund assessments paid shall be non-refundable.

(b) If Training Provider has collected money from, or on behalf of, a student for transmittal on the student's behalf to a third party such as the WDB for a bond, library usage, or fees for a license, application, or examination and Training Provider has not paid the money to the third party or has not yet been billed or invoiced by the third party at the time of the student's or institution's withdrawal, Training Provider shall refund the money to the student or third party payer within 45 calendar days of the student or institution withdrawal.

(c) Training Provider shall refund any credit balance on the student's account within 45 calendar days after the date of the student or institution withdrawal and shall provide the student with a copy of the document described by Section 71920(b)(10). (1) If a refund is made to a third party on behalf of a student who has withdrawn or been withdrawn from an educational program, Training Provider shall provide the student, within 45 calendar days after the date of the student or institution withdrawal, a written notice as described in Section 71920(b)(10), in hard-copy or electronic format, itemizing the amount refunded to each third party, the name of the third party, and the date of each refund, as applicable.

(d) Training Provider shall maintain a log, kept current on a monthly basis in electronic version or hard copy, of all student and institution withdrawals. The log shall include the names, addresses, telephone numbers, personal email addresses, dates of withdrawal, and refund amounts of all students withdrawn from Training Provider during the previous calendar year.

Note: Authority cited: Sections 94877 and 94885, Education Code. Reference: Sections 94885, 94919, and 94920, and 94927 (Education Code).

Process of Outstanding Training and/or Tuition Refunds: The responsibility for the collection of any outstanding training and/or tuition refunds lies with the Finance Manager and/or Fiscal Unit in coordination with the Program Management Team. The Fiscal Unit will oversee the administration and tracking of any refunds due to the program, while the Program Management Team ensures that program participants comply with the requirements outlined in the WIOA program.

The Fiscal Unit has concluded that collecting refunds is a labor-extensive task which can result in long refund processing times or loss of funds if the refunds are not received. For this reason, the Fiscal Unit avoids the need to collect training and/or tuition refunds by ensuring invoices are paid when the deliverables have been met. This approach saves time and helps ensure no overpayments are made and no refunds are required.

Recovery of ITA Tuition Funds: Unused training funds under WIOA are recovered when participants withdraw or do not complete training, when there are overpayments or excess funds, or if funds are not used within the approved timeframe. The recovery process involves notifying relevant parties, reconciling funds, and making adjustments to accounts or invoices. Recovered funds are reallocated to serve other eligible participants, with all actions documented and reported per WIOA regulations.

In the event a participant discontinues training, the WIOA/non-WIOA service provider (case manager) must conduct due diligence to ensure the recovery of WIOA/non-WIOA funds provided to training institutions. WIOA/non-WIOA service providers (case managers) must verify the following:

- a. The refund policy of the training provider for early termination from the training program;
- b. The requirement for the training provider to notify the WIOA/non-WIOA service provider (case manager) of early participant dropout;
- c. The percentage of the advance payment to be returned;
- d. Turnaround timeframe for the refund; and
- e. Time spent in training before a refund will no longer be honored.

Refund for Over-Invoiced Training Funds: Pursuant to the audit and review process, invoices are reviewed, audited, or monitored to catch over-invoicing before payments are made, which may help prevent the need for refunds. However, in the event an overpayment occurs:

The MCWDB will require a refund for over-invoiced training in circumstances such as when training services were not provided as contracted, when invoiced amounts exceed actual costs, or when unallowable costs are included in the invoice. Additionally, refunds may be required if a training provider fails to meet performance targets, if duplicate payments occur, or if the provider is found to be non-compliant with WIOA guidelines. Once over-invoicing or discrepancies are identified, the MCWDB will notify the provider, request supporting documentation, and work with the provider to agree on the refund amount, which may be repaid directly.

Process to Address Over-invoicing and Services not Provided: If evidence of over-invoicing or invoicing of services that were not provided is uncovered by Fiscal, the ETPL training provider shall be notified and asked to provide supporting documentation. Upon verification of the actual circumstances by Fiscal, the training provider may be required to repay the overcharged amount(s) or make adjustments to invoices. Any needed corrective actions regarding repayments or adjustments will be documented and monitored by the MCWDB to ensure ongoing compliance with WIOA regulations. Additionally, the MCWDB is required to implement corrective measures as appropriate to prevent future discrepancies.

- IX. Confirmation of Participant Training & Documentation:** Upon receipt of the completed and signed ITA Contract (Exhibits G-1 through G-3), and the signed Participant Training Contract and Commitment Form (Exhibit F), the WIOA/non-WIOA service provider (case manager) shall confirm with the participant the start of training and document the enrollment into the CalJOBS system, (including case notes for each service/activity), as appropriate.
- X. Payment of ITA Invoices:** ITA invoices shall follow a non-refundable charges invoice, then a 20%/60%/20% invoice submission and payment process, where each % represents the amount of the participant's ITA Contract to be paid, as follows:
- 1. Non-Refundable Charges Invoice:** Within 15 days following the completion of the cancellation period, CONTRACTOR shall complete, sign and submit the non-refundable charges invoice for any approved non-refundable charges that have been documented in CONTRACTOR'S catalog, which may include a non-refundable deposit or application fee, not to exceed two hundred fifty dollars (\$250), or non-refundable amounts paid for educational materials, or both. The enrollment agreement and catalog shall specify whether and under what circumstances the amounts paid for educational materials are non-refundable.
 - 2. First Training Invoice (20%):** CONTRACTOR shall complete, sign and submit the first training invoice submitted to the WDB for processing after the student completes the first 20% of the total class hours, and with written verification from the school that the student is attending class. At this time attendance sheet must be submitted for the period representing 20% of the total amount of the participant's ITA contract minus the non-refundable charges. Attached to the invoice, CONTRACTOR must provide proof of successful student enrollment and attendance sheets signed by the participant.
 - 3. Midway Invoice (60%):** CONTRACTOR shall complete, sign and submit the midway training invoice at 60% of the total class hours, representing 60% of the total amount of the participant's ITA contract minus the non-refundable charges. Attached to the invoice, CONTRACTOR must provide proof of successful student attendance and performance, signed by the participant, and
 - 4. Final Invoice (20%):** CONTRACTOR shall complete, sign and submit the final invoice for the remaining 20% of the total amount of the participant's ITA contract. Attached to the invoice, CONTRACTOR must provide proof of successful student attendance and performance; signed by the participant. CONTRACTOR must also provide proof of successful student completion of training and

proof of an industry recognized credential, certificate and/or license obtained. If student has not yet received an industry-recognized credential, certificate and/or license within sixty (60) days of completion of program hours, CONTRACTOR must submit a written plan for the student's obtaining the credential, certificate and/or license. In this case, CONTRACTOR will be paid for the final invoice upon acceptance of the plan by the WDB Executive Director.

All invoices shall specify charges on an individual student basis, not to exceed the total participant ITA Invoice amount. In the event that the participant ITA Contract changes, e.g., change of courses, increased book costs, actual financial aid awards differing from projected awards, the WIOA/non-WIOA service provider will complete and forward to the training provider an amended participant ITA Invoice.

All invoices must include documentation to show that performance outcomes have been met in accordance with the participant's ITA. For participants who obtain a credential, certificate or license upon completion of their training, training provider shall submit a copy of the industry-recognized credential, certificate and/or license obtained with the last invoice.

For participants who enter into unsubsidized employment upon completion of their training, training provider shall submit placement information (e.g., name of employer, date of hire, job title, occupation/industry, hourly wage, schedule of hours, and pay check stub) with the last invoice.

Upon receipt of all invoices, the WIOA/non-WIOA service provider (case manager) will perform an independent review and validation of the invoice and documentation of performance outcomes before obtaining signatures and submitting the invoice and documentation to the WDB Fiscal Office to process for payment. Payment will be made to the training provider within ninety (90) days of receipt of a certified invoice from the WIOA/non-WIOA service provider (case manager) in the Office of the Auditor-Controller.

The WDB will reallocate the remainder of total participant ITA funds not paid to the training provider if participant's ITA goals are not met.

ATTACHMENTS: Exhibit A – ITA Checklist
Exhibit B – Labor Market Research Form
Exhibit C – Training Program & Provider Research Form
Exhibit D – Pre-Vocational/Job Readiness Online Training Form
Exhibit E – Budget Form
Exhibit F – Participant Training Contract and Commitment Form
Exhibit G – ITA Invoices (G-1 - G-3), ITA Waiver (G-4), ITA Amendment (G-5), and ITA Deobligation (G-6)

INQUIRIES

If you have questions, please contact staff at (831) 755-3240. This policy is posted on the WDB website located at: [Policies & Procedures | Monterey County Works](#).

CHRIS DONNELLY, Executive Director Monterey
County Workforce Development Board



MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: New Website Agreement

DATE: April 16, 2026

RECOMMENDATION:

It is recommended that the Executive Committee consider and approve staff to execute a new, three-year website development, hosting, and maintenance agreement with Pat Davis Design Group (PDDG) in an amount not to exceed \$57,000 for the period from July 1, 2026, through June 30, 2027.

BACKGROUND:

At its meeting on August 1, 2018, the Executive Committee approved the Request for Proposal (RFP) Selection Committee's recommendations to negotiate an agreement to design, develop, maintain, and host a new website with PDDG based on the results of an RFP process conducted earlier in 2018. PDDG, a marketing and communications services provider to private and public entities since 1977, had successfully provided similar design and development services for other workforce development boards.

On August 23, 2021, the MCWDB received approval from the Board of Supervisors to authorize the Executive Director to sign a new three-year agreement with PDDG for the period of July 1, 2021 through June 30, 2024 in an amount not to exceed \$35,000 per year, with two renewals to extend the agreement by one additional year per renewal with an annual increase to not exceed \$3,500. The scope of work for this agreement included ongoing hosting, maintenance, security, and technical support services for the website and related tools and applications; new webpage design and content development; and refreshes of existing webpages on the site, which will come to an end on June 30, 2026.

DISCUSSION:

Staff seeks the Executive Committee's approval to execute a new, three-year agreement for website services with two additional one-year renewal options, in an amount not to exceed \$57,000 for the initial year. Renewals to extend the agreement for the second and third years are subject to funding availability and may also require a modification of the scope of work.

NEXT STEPS:

In April 2018, the Board of Supervisors (BOS) granted MCWDB's Executive Director the authority to sign certain agreements not to exceed \$45,000. Because the amount for the initial year of website services (\$57,000) exceeds the Executive Director's signing authority, the new agreement will also require BOS approval.



MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Approval of MCWDB's 2026-2028 Strategic Plan

DATE: April 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board (MCWDB) Executive Committee reviews and approves the 2026-2028 Strategic Plan and forwards the recommendation to the full Board for consideration.

BACKGROUND/DISCUSSION:

For the Board Retreat in October 2025, MCWDB obtained the facilitation services of Tressa Dorsey, the founder and president of TAD Grants, a company that specializes in professional development training, grant writing, and technical assistance to workforce organizations. She reviewed prior strategic planning documents and provided basic information to develop a 2026-2028 Strategic Plan for the MCWDB.

Since the Board Retreat, MCWDB staff have continued the planning process as it relates to Goal #2, Board Recruitment and Retention, and have added Goal #5 to address the need for a fundraising strategy.

NEXT STEPS:

If the proposed 2026-28 Strategic Plan is approved by the Executive Committee, it will be forwarded to the full Board for consideration at its meeting on April 23, 2026.



Monterey County Workforce Development Board

Strategic Planning 2026-2028

Monterey County Workforce Development Board (WDB) Strategic Plan 2026-2028

Introduction

The Monterey County Workforce Development Board (WDB) Strategic Plan provides a comprehensive roadmap to strengthen industry engagement, workforce alignment, and community visibility across Monterey County. This plan is grounded in data-driven insights, stakeholder collaboration, and the region's unique economic and geographic characteristics. It spans eight bi-monthly phases (8 Quarters for purposes of conciseness in this report) and focuses on four key priorities: (1) Developing Sector Strategies, (2) Building Brand Awareness through a Public Relations Campaign, and (3) Advancing Career Pipelines in Key Industries. Each initiative is designed to ensure the WDB remains responsive, innovative, and connected to the county's economic priorities. (4) Advance and Develop Career Pipelines in Key Industries (Ag Tech, DART, Green Jobs).

SWOT Analysis Summary

The WDB's strengths include being housed in the County of Monterey's Administrative Office, its strong partnerships with local community colleges, responsiveness to business needs, diverse and experienced staff, and a well-regarded reputation within the region. Monterey County's desirable location, robust agricultural sector, and commitment to on-the-job training provide additional leverage for workforce advancement.

However, challenges persist, including the prevalence of low-wage industries, high cost of living, and limited availability of head-of-household jobs. Geographic barriers due to the county's rural size, staffing shortages, and limited marketing capacity hinder outreach and service delivery. There is also a recognized need for a stronger succession plan, increased healthcare representation on the board, and broader community awareness of WDB initiatives.

Opportunities include expanding access to apprenticeships that lead to higher-wage employment, building stronger partnerships between employers and educational institutions, and leveraging advancements in agricultural technology, artificial intelligence, and transportation infrastructure projects. Emerging collaborations with schools, veterans' organizations, and housing development partners further position the WDB to expand impact and visibility. Threats include natural disasters, funding fluctuations, regionalization of workforce boards, and challenges associated with the aging workforce, housing shortages, immigration enforcement, and evolving labor market dynamics due to automation and artificial intelligence.

Goal 1: Develop Sector Strategies to Ensure Industry Demand is Understood and Addressed

Objective: Strengthen engagement with key industries to identify workforce needs and align training, recruitment, and service delivery strategies accordingly.

Quarterly Timeline:

- Q1: WDB begins outreach to key industries, inviting participation in meetings to discuss occupational shortages and trends.
- Q2: Review WDB budget to explore hiring a consultant to conduct a market analysis.
- Q3: (a) Contract with a research firm to conduct the market analysis; (b) initiate meetings with the Grower Shipper Association and Farm Bureau.
- Q4: (a) Research firm presents findings to WDB; (b) outreach to the Monterey Hospitality Association initiated.
- Q5: (a) Board will recruit representatives from key industries to serve on WDB; (b) formal partnership established with Agriculture Industry.
- Q6: Conduct focus group with top key industry identified in research.
- Q7: Generate list of job openings to prioritize.
- Q8: Launch industry sector strategies—operationalized and supported by partnerships in Agriculture and Hospitality sectors.

Goal 2: Add Industry Employers to the Board (Healthcare Representation Emphasis)

Objective: Strengthen board composition by recruiting employers from key industries, particularly in healthcare, to enhance strategic alignment and sector representation.

Define Board Needs and Goals – WDB Mission and Vision (Q1 through Q8)

Quarterly Timeline:

- Q1: (a) Executive Committee identifies specific employers in high growth areas and sectors – Health Care, Agriculture, Hospitality/Tourism, Advanced Manufacturing – as the primary focus areas for Board member recruitment.
(b) Executive Committee identifies relevant professional organizations for MCWDB outreach to identify potential Board members.
(c) Board members identify 3 potential organization and association members in high-growth sectors.

- Q2: (a) Executive Committee develops a clear message that highlights the unique value of the MCWDB:
- i. Membership provides an opportunity to influence workforce strategies in Monterey County.
 - ii. The MCWDB brings together the key organizations working to train and employ Monterey County residents.
- (b) Board members leverage social media platforms and professional organizations to promote MCWDB and its initiatives:
- i. Create a Public Relations plan.
 - ii. Promote and hold an Open House.
 - iii. Use their social media and professional organizations to expand opportunities to meet with potential Board members.
 - iv. Provide personalized outreach.
- (c) WDB staff develops outreach materials to engage potential new board members, to include:
- i. Mission/Vision
 - ii. Impact Report
 - iii. WDB funding
 - iv. Time commitment and Board member responsibilities to clarify expectations
 - v. Talking Points for Board members/business cards/name tags
- (d) When requesting quorum for the June 2026 Board meeting, staff suggests that members invite a potential board member to attend the WDB meeting.

- Q2—Q8: (a) Board members engage potential candidates through personalized outreach and nominate them to the MCWDB.
- (b) Board Chair and Executive Director hold in-person and/or Zoom Board Member orientation meetings to onboard new members, and Board Chair checks in with new members after their first two Board meetings.

Board Retention Strategy (Q2 through Q8)

Quarterly Timeline:

- Q2—Q8: (a) WDB staff sends out a Board Pre-Orientation packet once an individual is nominated to sit on WDB, including:
- i. Bylaws
 - ii. Strategic Plan

- iii. Organizational Chart
- iv. Calendar of meetings and events
- v. Financial Reports

- (b) WDB staff implements a structured Board Member Orientation program for onboarding new members.
- (c) Executive Director and WDB staff provide ongoing, relevant training for Board members on WIOA and industry trends.

- Q4—Q8:
- (a) All Board members participate on a committee – Business Services or Career Services – to increase their deep knowledge of the work of the WDB.
 - (b) Board Chair, Executive Director, and WDB staff ensure Board members are aware of opportunities for their professional development – CWA conferences, workshops, webinars.
 - (c) Board initiatives focus on results that foster a sense of accomplishment and purpose for Board members.
 - (d) WDB staff administers a Board Member Satisfaction Survey to obtain feedback from the Board members.

Goal 3: Create a Public Relations Campaign to Strengthen WDB Brand Identity

Objective: Develop and implement a strategic public relations campaign to increase visibility, community engagement, and awareness of WDB’s role and accomplishments throughout Monterey County.

Quarterly Timeline:

- Q1: Committee identifies current marketing strategies and gaps to address.
- Q2: Identify budgetary needs to support the development of the PR campaign; conduct outreach to workforce stakeholders to refine messaging.
- Q3: Develop a ‘speakers bureau’ of WDB members and a standardized presentation to deliver across community events and organizations.
- Q4–Q5: Launch outreach to schools, veterans’ organizations, and CBOs; increase participation in job and resource fairs.
- Q6: Initiate outreach to local media outlets to secure workforce-related coverage and increase public visibility.
- Q7–Q8: Expand marketing reach through digital billboards, school marquees, and other community platforms. Measure success by increases in partnerships, programs, and funding.

Goal 4: Advance and Develop Career Pipelines in Key Industries (Ag Tech, DART, Green Jobs)

Objective: Build sustainable career pathways and apprenticeship programs in high-demand industries, leveraging educational partnerships and economic development initiatives.

Quarterly Timeline:

- Q1: Invite County Economic Development to present the SEDS plan to WDB; initiate engagement with United Way Childcare Initiative.
- Q2: Contract with research firm for market analysis; review findings to identify growth industries and engage employers on pipeline opportunities.
- Q3: Develop capacity around apprenticeship intermediary work; learn from other local WDBs on partnerships with Project Labor Agreements (PLAs) and Community Benefit Agreements (CBAs).
- Q4–Q5: Engage County and Cities in PLA/CBA opportunities; meet with local colleges and K-12 institutions to align CTE and apprenticeship programs.
- Q6–Q7: Link education and industry partners to develop WDB-led apprenticeship programs.
- Q8: Launch apprenticeship program within one industry; evaluate success and scalability.

Goal 5: Develop Funding Strategy

Objective: Support the Central Coast Regional Workforce Partnership to develop and implement a successful and sustainable fundraising strategy. (Q3 through Q8)

Quarterly Timeline:

- Q3: (a) Develop a *purpose* for the Central Coast Regional Workforce Partnership (CCRWP) non-profit to include:
- i. Mission/Vision
 - ii. Develop Strategic Plan for the CCRWP
 - iii. Conduct SWOT analysis related to funding
 - iv. Develop Case Statement/Impact Report showing WDB outcomes and why donors should support the mission of CCRWP

- v. Fund utilization report – review historical data of past donors
- (b) Identify funding strategies/priorities and align fundraising goals with overall strategic plan:
 - i. Target Potential Funders
 - ii. Define Revenue Mix
 - iii. Grants – Foundations
 - iv. Local/Regional Grants
 - v. Corporate Partnerships - Employee Giving programs
 - vi. Earned Income – provide fee-based programs/certifications to employers or individuals
 - vii. Special Events
 - viii. Embrace culture of philanthropy
- (c) Recruit a minimum of 3 new (non-WDB) Board members for the CCRWP non-profit, inform them of the results of steps 1 and 2 above, and request their input on purpose and strategies.

Q4: (a) Engage stakeholders and implement CCRWP Strategic Plan:

- i. Engage CCRWP Board members, WDB members, and staff – define roles and responsibilities
 - ii. Begin to develop fundraising strategy
 - iii. Streamline giving process by facilitating donations via MC Works website and/or other avenues.
 - iv. Create communication and marketing strategy with a consistent narrative showing donor impact, including developing a Marketing Calendar to engage donors.
- (b) Prior to the October 2026 Board Retreat, WDB staff will schedule a meeting of the CCRWP members and WDB staff to assist the CCRWP to fully develop its fundraising strategy.
- (c) Provide a presentation to the Board on CCRWP’s fundraising plan at the October 2026 Board Retreat.

Q5: (a) Engage stakeholders and implement CCRWP Strategic Plan:

- (b) WDB staff will assist CCRWP members to develop a purpose statement and implement their fundraising strategy, including working to build relationships for long-term donor retention.
- (c) WDB staff will assist CCRWP members during the remainder of Q5 through Q8 to monitor and evaluate fundraising performance against goals on a quarterly basis and adjust the fundraising plan as needed, based on performance data and/or external factors.

Conclusion

This Strategic Plan positions the Monterey County Workforce Development Board to enhance its regional impact through data-driven decision-making, targeted partnerships, and innovative workforce solutions. Through focused efforts in sector engagement, board development, public relations, and career pathway creation, the WDB will continue to drive equitable economic growth and strengthen the Monterey County workforce ecosystem.

Quarterly Implementation Table

Goal	Objective	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8
Goal 1: Develop Sector Strategies to Ensure Industry Demand is Understood and Addressed	Strengthen engagement with key industries to identify workforce needs and align training, recruitment, and service delivery strategies accordingly.	WDB and Business Services begin outreach to key industries, inviting participation in meetings to discuss occupational shortages and trends.	Review WDB budget to explore hiring a consultant to conduct a market analysis.	Contract with a research firm to conduct the market analysis; initiate meetings with the Grower Shipper Association and Farm Bureau.	Research firm presents findings to WDB; outreach to the Monterey Hospitality Association initiated.	Board will recruit representatives from key industries to serve on WDB; formal partnership established with Agriculture Industry.	Conduct focus group with top key industry identified in research.	Generate list of job openings to prioritize.	Launch industry sector strategies. Operationalized and supported by partnerships in Agriculture and Hospitality sectors.
Goal 2: Add Industry Employers to the Board (Healthcare Representation Emphasis)	Strengthen board composition by recruiting employers from key industries, particularly in healthcare, to enhance strategic alignment and sector representation.	Identify 1–3 agriculture & Healthcare industry organizations and Association members as potential board members.	Develop a comprehensive Board Information Packet with high-level talking points and promotional materials.	Engage potential candidates through personalized outreach and emphasize the opportunity to influence workforce strategies.	Continue nominations and new member orientations to ensure required WDB membership composition percentages.	Implement Board Member Retention Strategy and continue nominations and orientation of new board members as needed.	Continue Implementing Board Member Retention Strategy and continue nominations and orientations as needed.	Continue implementing Board Member Retention Strategy and continue nominations and orientations as needed.	Review and Evaluate Success by appointment and retention data and continue Retention Strategy, nominations, orientations.

			Engage and nominate candidates and provide orientations to new WDB members.	Continue nominating and orienting new members.					
Goal 3: Create a Public Relations Campaign to Strengthen WDB Brand Identity	Develop and implement a strategic public relations campaign to increase visibility, community engagement, and awareness of WDB's role and accomplishments.	Committee identifies current marketing strategies and gaps to address.	Identify budgetary needs to support PR campaign; conduct outreach to workforce stakeholders to refine messaging.	Develop a "speakers bureau" of WDB members and standardized presentation for community outreach.	Launch outreach to schools, veterans' organizations, and CBOs; increase participation in job/resource fairs.	Continue community outreach and evaluate campaign performance.	Initiate outreach to local media outlets for workforce-related coverage.	Expand marketing reach through digital billboards, school marquees, and community platforms.	Measure success by increases in partnerships, programs, and funding.
Goal 4: Advance and Develop Career Pipelines in Key Industries (Ag Tech, DART, Green Jobs)	Build sustainable career pathways and apprenticeship programs in high-demand Ag-Tech, DART and Green Jobs leveraging educational partnerships and economic development initiatives.	Invite County Economic Development to present SEDS plan to WDB. Initiate engagement with United Way Childcare Initiative.	Contract research firm for market analysis on industry growth and workforce needs. Review findings to identify high demand	Develop capacity around apprenticeship intermediary work. Research best practices from other WDBs on PLAs and CBAs.	Engage County and Cities on PLA/CBA opportunities. Meet with local colleges, K-12 institutions, and training providers to align CTE programs.	Continue engagement with education and industry partners. Plan for pilot apprenticeship program in one key industry. Secure funding and resources	Develop WDB-led apprenticeship programs with employer partners. Implement mentorship and career coaching components.	Launch apprenticeship program within the first industry. Monitor participation, employer engagement, and trainee progress.	Operationalize career pathways across growth industries with education and industry partners. Evaluate long-term outcomes and plan next cycle of program expansion.

		Identify key growth industries and potential partner employers.	occupations in Ag Tech, DART, and Green Jobs. Begin mapping current educational & apprenticeship programs.	Identify target employers for apprenticeship and training programs.	Draft initial apprenticeship and pipeline program structure.	for program launch.	Evaluate program readiness for launch.	Adjust program based on early feedback.	
Goal 5: Develop Funding Strategy	Support the Central Coast Regional Workforce Partnership to develop and implement a successful and sustainable fundraising strategy.			Develop a <i>purpose</i> for the CCRWP, including a strategic plan. Identify funding strategies and priorities and align goals with Strategic Plan. Recruit 3 non-WDB members for CCRWP.	Engage stakeholders and implement CCRWP's Strategic Plan. Schedule a CCRWP meeting to develop fundraising strategy to present at Board Retreat.	Staff to assist CCRWP to develop purpose statement and implement fundraising strategy. Evaluate the Strategic Plan and fundraising actuals against goals.	Evaluate the Strategic Plan and fundraising actuals against goals.	Evaluate the Strategic Plan and fundraising actuals against goals.	Evaluate the Strategic Plan and fundraising actuals against goals.

Board Recommendations

All board members should volunteer to be on at least one committee. One board staff should assist with scheduling, coordination, note taking and implementation of strategies. Create a standing agenda item for each board meeting to review progress and status of goals by each committee.

Goal 1: Develop Sector Strategies to Ensure Industry Demand is Understood and Addressed

Objective: Strengthen engagement with key industries to identify workforce needs and align training, recruitment, and service delivery strategies.

Recommendations:

1. **Establish Industry Sector Committees:** Form sector-specific advisory groups (e.g., Healthcare, Advanced Manufacturing, Ag Tech, and Green Jobs) consisting of employers, education partners, and workforce staff to provide quarterly input on emerging skills needs.
2. **Conduct Comprehensive Labor Market Analysis:** Partner with regional economic development organizations and utilize existing sources to analyze in-demand occupations, skill gaps, and wage trends to guide training investments.
3. **Develop Sector Playbooks:** Create concise strategy documents for each sector that outline employer needs, existing training resources, and recommended investments or policy actions.
4. **Integrate Sector Focus into Business Services:** Align the Business Services team to support sector priorities and tailor employer engagement to industry clusters rather than general outreach.
5. **Establish Performance Metrics:** Track metrics such as number of employers engaged, training enrollments aligned with sector needs, and job placements within targeted industries.

Goal 2: Add Industry Employers to the Board (Healthcare Representation Emphasis)

Objective: Ensure the Board reflects the regional economy and includes voices from key growth industries.

Recommendations:

1. **Conduct Board Composition Analysis:** Assess current membership to identify gaps in industry representation, especially in healthcare, green tech, and advanced manufacturing.

2. **Launch a Targeted Recruitment Campaign:** Work with regional hospital systems, healthcare networks, and local medical associations to identify potential board candidates.
3. **Develop a Board Recruitment Toolkit:** Include clear descriptions of board member roles, responsibilities, and impact to assist in outreach and engagement.
4. **Leverage Existing Partnerships:** Utilize relationships with chambers, industry associations, and sector partnerships to identify interested employers.
5. **Institute Rotating Term Appointments:** Create opportunities for emerging industry leaders to serve through term-based or advisory seats to keep board engagement fresh and relevant.

Goal 3: Create a Public Relations Campaign to Strengthen WDB Brand Identity

Objective: Increase public awareness of the Workforce Development Board’s mission, services, and regional impact.

Recommendations:

1. **Develop a Comprehensive Communications Plan:** Define key messages, audiences, and communication channels (social media, local news, employer newsletters, etc.).
2. **Highlight Success Stories Using Data:** Showcase employer partnerships, job seeker outcomes, and innovative training initiatives to reinforce the WDB’s role as a workforce leader.
3. **Modernize Branding Materials:** Refresh visual identity and marketing collateral to align with a unified, professional image.
4. **Engage Local Media and Stakeholders:** Host press events, employer roundtables, and community showcase to build awareness and credibility.
5. **Measure Brand Reach:** Track engagement through website analytics, social media metrics, and stakeholder feedback to assess brand impact and adjust strategy.

Goal 4: Advance and Develop Career Pipelines in Key Industries (Ag Tech, DART, Green Jobs)

Objective: Strengthen regional career pathways that align with high-growth industries and employer needs.

Recommendations:

1. **Map Existing Career Pathways:** Identify current training programs, credentials, and employment pipelines in Ag Tech, DART (Digital Automation & Robotics Technology), and Green Jobs sectors. Includes actively soliciting new training providers to join the Eligible Training Provider List to meet occupational training demands.
2. **Establish Employer-Led Curriculum Development:** Work with employers and training providers to co-design curriculum and identify credential gaps.
3. **Secure Funding for Pathway Development:** Pursue state and federal grants (e.g., WIOA, Good Jobs Challenge, or Climate Corps funding) to support program creation and expansion. This will include reviving the Non-Profit organization for raising additional philanthropic funding and fundraising activities.
4. **Create Youth and Adult On-Ramps:** Develop outreach and engagement strategies to introduce high school and adult learners to these industries through internships, apprenticeships, and work-based learning.
5. **Implement Continuous Evaluation:** Track pipeline performance through placement rates, completion data, and employer satisfaction to refine programs and ensure sustainability.

Goal 5: Develop Funding Strategy

Objective: Support the Central Coast Regional Workforce Partnership (CCRWP) to develop and implement a successful and sustainable fundraising strategy.

Recommendations:

1. **Develop a Purpose and Strategic Plan for the CCRWP:** Work with staff to identify funding strategies, priorities, and goals to align with MCWDB Strategic Plan.
2. **Recruit a Minimum of Three Non-WDB CCRWP members:** CCRWP board members cannot also be WDB members based on the potential for conflict of interest.
3. **Engage Stakeholders and Implement CCRWP Strategic Plan:** Schedule a CCRWP meeting to develop fundraising strategy to be presented at Board Retreat.
4. **Develop a Purpose Statement and Implement Fundraising Strategy:** Work with staff to schedule a meeting for the CCRWP to implement its fundraising strategy with an emphasis on building long-term relationships with funders.

5. **Provide a Quarterly Evaluation of Fundraising Performance and Plan:** Fundraising will be evaluated against goals on a quarterly basis moving forward.
-

Implementation Oversight

Board Role:

- Establish a Strategic Implementation Committee or designate existing committees (e.g., Executive, Business Services, or Career Services) to oversee each goal area.
- Provide bi-monthly progress reports on key performance indicators and adjust strategies as needed.
- Direct the Executive Director and staff to develop annual work plans aligned with these goals and report progress regularly.

1. Establish Board Committees

- **Career Pipeline & Apprenticeship Committee:** Oversees pipeline program development, partnerships with employers and education, and program evaluation.
- **Industry Engagement Committee:** Focuses on building and maintaining relationships with key industries (Ag Tech, DART, Green Jobs).
- **Education & Training Committee:** Ensures alignment of local colleges, K-12 CTE programs, and workforce training initiatives with industry needs.
- **PR & Community Outreach Committee:** Coordinates communications, marketing, and community awareness campaigns to support recruitment and visibility of pipeline programs.

2. Define Roles and Responsibilities

- **Board Chair:** Leads overall strategic direction, approves committee actions, and ensures alignment with the WDB mission.
- **Committee Chairs:** Lead committees, schedule meetings, report progress to full board, and drive decision-making.
- **Industry Representatives:** Provide sector-specific insights, identify workforce needs, and facilitate employer partnerships.
- **Education Representatives:** Advise on program alignment with curriculum and training programs, support apprenticeship structure.
- **Community Representatives:** Help with public relations, outreach, and identifying community resources to support pipelines.

3. Implement a Structured Meeting Cadence

- **Bi-Monthly Full Board Meetings:** Review progress on pipeline development, approve key strategies, and evaluate program outcomes.
- **Monthly Committee Meetings:** Committees meet to advance their specific objectives and address challenges.
- **Bi-Monthly Progress Reports:** Committees submit short progress updates to the full board to maintain transparency and track milestones.

4. Set Clear Goals, Metrics, and Accountability

- **Establish KPIs for each objective:**
 - Number of apprenticeships launched.
 - Employer and education partnerships formalized.
 - Participant placement and retention rates
 - Feedback from employers and trainees
- **Quarterly progress dashboard:** Track actions vs. target for each bi-monthly milestone.

5. Use Project Management Tools

- Adopt a project management tool (like Asana, Trello, or Smartsheet) to track objectives, tasks, deadlines, and responsible parties.
- Create a shared timeline of the 8-quarter action plan, visible to all board members.

6. Foster Collaboration and Communication

- Regularly communicate successes, challenges, and upcoming milestones.
- Encourage cross-committee collaboration to prevent siloed work.
- Provide professional development training to board members on industry trends and workforce development strategies.

7. Leverage External Resources

- Bring in subject matter experts (industry, apprenticeship programs, education) for board education sessions.
- Hire consultants for market analysis or program design when needed.

- Partners with workforce organizations, local chambers, and community-based organizations to expand reach and resources.

8. Plan for Sustainability

- Develop strategies for ongoing funding and resource allocation for apprenticeship programs.
- Create succession plans for committee chairs and board members to maintain continuity.
- Document lessons learned and continuously refine processes to improve program efficiency and outcomes.

Discussion on the Recruitment of a Private Sector Board Member from the Healthcare Industry

Chair Erik Cushman will lead a discussion regarding the recruitment of a private sector Board member from the Healthcare industry.

Discussion on the 2026 Local and Regional Contractor List Request for Qualifications (RFQ)

Executive Director Chris Donnelly will discuss the 2026 Local and Regional Workforce Innovation and Opportunity Act (WIOA) Contractor List RFQ, which is anticipated to benefit the workforce development boards of Monterey, Santa Cruz, San Benito, and San Luis Obispo counties through the administrative efficiency of conducting a regional RFQ process. The most recent local and regional RFQ process was performed in 2024.

Discussion on the Timeline for Youth and Adult/Dislocated Worker Services Requests for Proposals (RFPs)

Executive Director Chris Donnelly will discuss the anticipated timeline for the upcoming release of the Workforce Innovation and Opportunity Act (WIOA) Youth and Adult/Dislocated Worker RFPs. To avoid potential service disruptions based on conducting two simultaneous RFP processes, the Youth RFP is expected to be released in August 2026 with a January 1, 2027, start date, meaning that the 2026 Youth contract amendments will have a six-month term. The Adult and Dislocated Worker RFP will be released in January 2027 with a July 1, 2027, start date.

Update on the Monterey County Workforce Development Board's 2025-26 3rd Quarter Budget

Expenditures from July 2025 through March 2026 total **\$4,053,612**, allocated across the following funding streams:

- **Adult:** \$1,743,427
- **Dislocated Worker:** \$985,757
- **Youth:** \$1,324,428

These figures reflect the distribution of funds across core workforce programs during the reporting period. Case management costs are included in the expenditure totals for the period of July 2025 through January 2026.

As of March 2026, the MCWDB is at **approximately 44%** of its total budget for the 2025–2026 program year.

Areas of Concern:

- **Under-expenditure relative to timeline:** With roughly 75% of the fiscal year elapsed, spending at 44% indicates that the program is significantly behind the expected burn rate.
- **Uneven case management spending:** Dislocated Worker (DW) expenditures appear lower compared to Adult and Youth programs, possibly indicating lower participation or slower rollout.
- **Risk of funding recapture or compliance issues:** If spending does not accelerate, there may be challenges meeting programmatic and funding requirements by year-end.

BUDGET FY 2025-26

	Available funding	\$ 9,070,228	
	Projected Total Program Expenses FY26	\$ 9,339,531	
	Variance	\$ (269,304)	

Income		Allocations		33%	34%	33%						
	Admin	FY Budget		Adult	Adult Expenditures	DW	DW Expenditures	Youth	Youth Expenditures	Total	Total Expenditures	Available
Funding				\$ 2,537,272.00		\$ 2,591,113.00		\$ 2,581,293		\$ 7,709,678		
	Admin 10%			\$ 253,727	\$ 89,624	\$ 259,111	\$ 140,337	\$ 258,129	\$ 111,687	\$ 770,968	\$ 341,648	\$ 429,320
	Program 90%			\$ 2,283,545		\$ 2,332,002		\$ 2,323,164		\$ 6,938,710		
	Carry-in 23-24 Budget			\$ 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	\$ -	
	Use's											
	SB 734			\$ 685,063	\$ 342,521	\$ 699,601	\$ 25,277			\$ 1,384,664	\$ 367,798	\$ 1,016,866
	Youth WEX							\$ 464,633	\$ 45,110	\$ 464,633	\$ 45,110	\$ 419,522
	Available Funding for Adult, DW and Youth	\$ 7,220,931		\$ 2,152,911	\$ 342,521	\$ 2,107,528	\$ 25,277	\$ 2,960,492	\$ 45,110	\$ 7,220,931	\$ 412,908	\$ 6,808,023
Expenses												
	Personnel											
	Salaries			\$ 1,654,671								
	Salaries/ Benefits Total			\$ 546,041	\$ 166,004	\$ 562,588	\$ 195,863	\$ 546,041	\$ 170,027	\$ 1,654,671	\$ 531,894	\$ 1,122,777
	Case Management											
	Adult	\$ 900,000		\$ 900,000	\$ 477,569					\$ 900,000	\$ 477,569	\$ 422,431
	DW	\$ 400,000				\$ 400,000	\$ 138,259			\$ 400,000	\$ 138,259	\$ 261,741
	Youth CM	\$ 1,350,000						\$ 1,350,000	\$ 603,365	\$ 1,350,000	\$ 603,365	\$ 746,635
	CM FY25				\$ 216,662		\$ 73,139		\$ 226,637		\$ 516,438	
	One Stop Operator	\$ 334,532		\$ 110,396	\$ 80,013	\$ 113,741	\$ 86,071	\$ 110,396		\$ 334,532	\$ 166,084	\$ 168,448
		\$ 2,984,532		\$ 1,010,396	\$ 774,244	\$ 513,741	\$ 297,469	\$ 1,460,396	\$ 830,002	\$ 2,984,532	\$ 1,901,715	\$ 1,082,817
	Client Related Services											
	Youth ITA's	\$ 60,000						\$ 60,000	\$ 13,320	\$ 60,000	\$ 13,320	\$ 46,680
	Supportive Services	\$ 45,000		\$ 14,850		\$ 15,300		\$ 14,850	\$ 1,394	\$ 45,000	\$ 1,394	\$ 43,606
	Pre Voc Workshops	\$ 20,000		\$ 6,600	\$ 1,003	\$ 6,800	\$ 400	\$ 6,600	\$ 889	\$ 20,000	\$ 2,292	\$ 17,709
	WorkKeys	\$ 18,000		\$ 5,940	\$ 3,969	\$ 6,120	\$ 1,404	\$ 5,940	\$ 2,970	\$ 18,000	\$ 8,343	\$ 9,657
		\$ 143,000		\$ 27,390	\$ 4,972	\$ 28,220	\$ 1,804	\$ 87,390	\$ 18,573	\$ 143,000	\$ 25,348	\$ 117,652
	Other Client Services											
	Business Services Enhancements	\$ 200,000		\$ 100,000	\$ 54,770	\$ 100,000	\$ 54,770			\$ 200,000	\$ 109,541	\$ 90,459
	Educational Training Coordinator	\$ 135,000		\$ 44,550	\$ 58,184	\$ 45,900	\$ 58,184	\$ 44,550		\$ 135,000	\$ 116,368	\$ 18,632
		\$ 335,000		\$ 144,550	\$ 112,954	\$ 145,900	\$ 112,954	\$ 44,550		\$ 335,000	\$ 225,909	\$ 109,091
	Non Personnel											
	Rent - ITD	\$ 336,089		\$ 110,909	\$ 58,901	\$ 114,270	\$ 58,901	\$ 110,909	\$ 41,155	\$ 336,089	\$ 158,956	\$ 177,133
	COWCAP	\$ 192,975		\$ 63,682	\$ 59,377	\$ 65,612	\$ 44,533	\$ 63,682	\$ 29,688	\$ 192,975	\$ 133,598	\$ 59,377
	County Counsel	\$ 45,000		\$ 14,850	\$ 8,583	\$ 15,300	\$ 8,583	\$ 14,850	\$ 4,283	\$ 45,000	\$ 21,450	\$ 23,550
	Other Operating Cost	\$ 269,500		\$ 88,935	\$ 25,385	\$ 91,630	\$ 15,417	\$ 88,935	\$ 9,024	\$ 269,500	\$ 49,826	\$ 219,674
	Staff Development/Training	\$ 45,000		\$ 14,850	\$ 6,141	\$ 15,300	\$ 6,141	\$ 14,850	\$ 4,887	\$ 45,000	\$ 17,169	\$ 27,831
	Travel - Conference	\$ 12,500		\$ 4,125		\$ 4,250		\$ 4,125		\$ 12,500		\$ 12,500
	Workers Comp - WDB	\$ 95,000		\$ 31,350		\$ 32,300		\$ 31,350		\$ 95,000		\$ 95,000
	Copy Machine Rental	\$ 10,000		\$ 3,300	\$ 2,800	\$ 3,400	\$ 2,951	\$ 3,300	\$ 1,133	\$ 10,000	\$ 6,884	\$ 3,116
	Calendaring/ Texting Tools	\$ 15,000		\$ 4,950		\$ 5,100		\$ 4,950		\$ 15,000		\$ 15,000
		\$ 1,293,064		\$ 426,711	\$ 201,459	\$ 439,642	\$ 162,584	\$ 426,711	\$ 123,336	\$ 1,293,064	\$ 487,379	\$ 805,685
	Other Non Personnel											
	Computer Annuals Lease	\$ 35,000		\$ 11,550	\$ 8,812	\$ 11,900	\$ 8,812	\$ 11,550	\$ 4,237	\$ 35,000	\$ 21,861	\$ 13,139
	MIPs	\$ 13,000		\$ 4,290	\$ 4,417	\$ 4,420	\$ 4,417	\$ 4,290	\$ 2,524	\$ 13,000	\$ 11,358	\$ 1,642
		\$ 48,000		\$ 15,840	\$ 13,229	\$ 16,320	\$ 13,229	\$ 15,840	\$ 6,761	\$ 48,000	\$ 33,219	\$ 14,781
	Contracts -other											
	T/A, ETPL	\$ 10,000		\$ 3,300	\$ 16,866	\$ 3,400	\$ 16,866	\$ 3,300	\$ 7,613	\$ 10,000	\$ 41,344	\$ (31,344)
	Monitoring	\$ 40,000		\$ 13,200		\$ 13,600		\$ 13,200		\$ 40,000		\$ 40,000
	Webhosting	\$ 40,000		\$ 13,200	\$ 8,271.34	\$ 13,600	\$ 8,262.84	\$ 13,200	\$ 4,785.32	\$ 40,000	\$ 21,320	\$ 18,681
	Outreach	\$ 45,000		\$ 14,850	\$ 13,283.25	\$ 15,300	\$ 11,111.50	\$ 14,850	\$ 6,533.75	\$ 45,000	\$ 30,929	\$ 14,072
	Studies	\$ 25,000		\$ 8,250		\$ 8,500		\$ 8,250		\$ 25,000		\$ 25,000
	Outreach materials	\$ 45,000		\$ 14,850		\$ 15,300		\$ 14,850		\$ 45,000		\$ 45,000
	Slingshot Temp Staffing	\$ 15,000		\$ 4,950		\$ 5,100		\$ 4,950		\$ 15,000		\$ 15,000
	Churnura	\$ 9,000		\$ 2,970		\$ 3,060		\$ 2,970		\$ 9,000		\$ 9,000
	Launch Pad	\$ 32,000		\$ 10,560		\$ 10,880		\$ 10,560		\$ 32,000		\$ 32,000
	15% Board mandated Reserve	\$ 770,968		\$ 254,419	\$ 262,129	\$ 262,129	\$ 254,419	\$ 262,129		\$ 770,968		\$ 770,968
		\$ 1,031,968		\$ 340,549	\$ 38,420	\$ 350,869	\$ 36,240	\$ 340,549	\$ 18,932	\$ 1,031,968	\$ 93,592	\$ 938,376
	Available Funding for Adult, DW and Youth after use's	\$ 7,220,931		\$ 2,152,911	\$ 1,653,803	\$ 2,107,528	\$ 845,420	\$ 2,960,492	\$ 1,212,741	\$ 7,220,931	\$ 3,711,964	\$ 3,508,967
	Budgeted for program expenses FY26	\$ 7,490,235		\$ 2,511,477	\$ 1,311,281	\$ 2,057,280	\$ 820,144	\$ 2,921,477	\$ 1,167,630	\$ 7,490,235	\$ 3,299,056	\$ 4,191,179
	Admin Expense				\$ 89,624		\$ 140,337		\$ 111,687	\$ 770,968	\$ 341,648	\$ 429,320
	Total-Expenditures				\$ 1,743,427		\$ 985,757		\$ 1,324,428			
	Program Expenditures July-MAR										\$ 3,711,964	
	Admin Expenditures July-MAR										\$ 341,648	
	Total-Expenditures										\$ 4,053,612	

Update on Building and Construction Trades Pre-Apprenticeship Program

Executive Director Chris Donnelly will provide an update to the Executive Committee on the building and construction trades pre-apprenticeship program.

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

Adult and Dislocated Worker Program

Monterey County Works staff attended the 2nd Annual LIFT Summit at Portola Plaza in Monterey to strengthen community visibility and expand professional networking opportunities. The event, promoted by DART (Drone, Automation, and Robotics Technology), provided valuable exposure for Monterey County Works, allowing staff to connect with community partners, employers, and attendees while promoting workforce programs and services. Staff's participation helped increase awareness of Monterey County Works as a trusted regional resource and supported relationship-building efforts that can lead to future partnerships, referrals, and collaboration.

Monterey County Works also celebrated the High Road Construction Careers (HRCC) graduation at the Salinas Career Center, with 12 participants completing the program. Graduates achieved important milestones by earning nationally recognized credentials such as Multi-Craft Core Curriculum (MC3) and OSHA 10, while also building hands-on skills in grading, concrete work, and tool use. These accomplishments reflect the impact of the HRCC program in preparing participants for careers in the building trades and expanding the local trades workforce pipeline.

Youth Programs

CaliforniansForAll-funded Green Cadre, Cohort #2

The second cohort of the CaliforniansForAll-funded Green Cadre will graduate on April 24. Over the past three months, the Cadre team has supported State Parks, the City of Monterey, and local community food banks, all while keeping every participant actively engaged in the program.

The climate-focused group, partnering with State Parks and the City of Monterey, has made significant progress in the last month. Green Cadre participants spent a full week at Asilomar State Beach, removing more than 700 feet of old fencing to prepare for a new installation. The group also cleared over one acre of invasive weeds along the Presidio of Monterey recreational trails, and at Del Monte Beach, the Cadre team supported maintenance work by clearing accumulated sand from walkways.

In recognition of their hard work, the Cadre team received acknowledgment from the City of Monterey and City Supervisor Steven Garcia. Special praise was given to the Green Cadre staff for their strong leadership and dedication to guiding and supporting participants throughout the program.

The food insecurity group has been working on a variety of projects with partners throughout the county to prepare for spring via the following activities:

- Sheet mulching, weeding, and pollinator planting for Highland Otis Park and Monterey Adult School in Seaside, Natividad Creek Park, and local food banks;
- Planting white onions with MEarth in Carmel;
- Conducting outreach for Double Up Food Bucks program and administering CalFresh surveys in Salinas, King City, and Greenfield;
- Assisting with food distribution at food banks across the county – Soledad (267 parcels distributed), Salinas (250 parcels distributed), Chualar (250 parcels distributed), as well as in Prunedale and Castroville; and
- Digging irrigation trenches, weeding, and mulching for the Pacific Gove Community Garden.

CaliforniansForAll-funded Green Cadre, Cohort #1

December Green Cadre graduates continue to pursue employment and are receiving ongoing support to reach their career goals. Five former participants have enrolled in postsecondary education at UC Berkeley, Hartnell College, and California State University Monterey Bay (CSUMB). Another five participants have secured employment in roles such as case manager with Sun Street Centers, maintenance worker with the City of Monterey, and counselor with Alsana in Pacific Grove.

WIOA-funded Tech-Social Media Cadre

The Tech-Social Media Cadre cohort began on March 30, with a total of 12 participants enrolled. Currently, the cohort is receiving in-house training in which they are synchronously learning together and building skills as a team; building local community networks; modeling effective verbal and non-verbal communication and critical thinking; pitching products and organizations; and learning workplace negotiation, how to interview effectively, and how to create a standout resume. Additionally, all participants are taking online courses to practice skills in social media marketing and engagement. All participants have completed their BuildEd and Metrix training and are working to complete their OSHA10 and sexual harassment training certifications.

Participants are looking forward to learning more about the small businesses that have signed up to provide Work Experience (WEX) sites and are preparing for their interviews scheduled for April 14 and 16. Ideally, all participants will start their WEX placements on April 20.

Upcoming Cadre Cohorts

Youth staff are currently recruiting for three upcoming Cadre cohorts – MCWDB's third Green Cadre cohort, a CaliforniansForAll/WIOA hybrid model to start May 4, a Hospitality Cadre to start May 11, and a summer Joby Aviation Tech Cadre to start June 1. The Youth staff are looking forward to supporting the orientations, interviews, onboarding/in-house training and work experience placements associated with each program.

WIOA-funded Certified Nursing Assistant (CNA) Cohort

The youth staff are once again partnering with Central Coast College (CCC) to link WIOA customers to a 6-week CNA training course. On April 20, five clients will start their CNA program, with Equus Workforce Solutions and Turning Point of Central California staff working closely together to support co-enrolled clients and ensure that all requirements are met.

New Collaborative Youth Staff Tools and Tactics

Youth Collaborative Outreach Tracker

The Youth Program and Project Directors have partnered to develop a shared outreach tracker that is visible to and updated daily by all Youth staff members. The tracker captures current outreach efforts, upcoming events, and standing meetings. Its purpose is to optimize staff time and reduce duplication of outreach activities by intentionally distributing the Youth staff across a broader range of events and geographic areas.

Weekly Program/Project Directors' Action Meetings and Tracker

Youth Program and Project Directors Lauren Walters and Lourdes Luviano have established a strong weekly meeting rhythm focused on performance and outcomes, identifying clear next steps and tracking them through a live PD meeting notes tracker, which is shared with the WDB.

Updates on Executive Committee Members' Workforce and Business Activities

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