



EXECUTIVE COMMITTEE MEETING AGENDA PACKET

Thursday, June 18, 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, June 18, 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>	
CONSENT CALENDAR:	Erik Cushman
1. ACTION: Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) Executive Committee meeting on May 21, 2026.	Erik Cushman
DISCUSSION OR REVIEW OF BUSINESS CALENDAR ACTION ITEMS:	Erik Cushman
1. ACTION: Consider and approve the appointment of Isaiah Madrigal, representing Business, for a three-year term, and recommend that the MCWDB forwards the appointment to the Board of Supervisors for final approval.	Erik Cushman
2. ACTION: Consider and approve the reappointment of Alma Diaz, representing the State of California Employment Development Department's Wagner Peyser program, for a three-year term, and recommend that the MCWDB forwards the appointment to the Board of Supervisors for final approval.	Erik Cushman
3. ACTION: Consider and approve the proposed, preliminary 2026-27 MCWDB budget.	Daisy Fernandez
4. ACTION: Consider and approve extending the agreement with Arbor E&T, dba Equus Workforce Solutions, to provide Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker case management services in the amount of \$1,300,000 for Program Year (PY) 2026-27, and recommend that the Executive Committee's approval is forwarded to the full board for consideration at its meeting of June 25, 2026.	Elizabeth Kaylor
5. ACTION: Consider and approve extending the agreement with Arbor E&T, dba Equus Workforce Solutions, to provide Youth case management services with WIOA and non-WIOA funding in the amount of \$350,000 for the first 6 months of PY 2026-27, and recommend that the Executive Committee's approval is forwarded to the full board for consideration at its meeting of June 25, 2026.	Elizabeth Kaylor
6. ACTION: Consider and approve extending the agreement with Turning Point of Central California to provide Youth case management services with WIOA and non-WIOA funding in the amount of \$350,000 for the first 6 months of PY 2026-27, and recommend that the Executive Committee's approval is forwarded to the full board for consideration at its meeting of June 25, 2026.	Elizabeth Kaylor
7. Update on MCWDB's 2025-26 3 rd Quarter budget.	Daisy Fernandez
8. Update on WIOA Adult, Dislocated Worker, and Youth program performance.	Vanessa Kor
9. Update on One Stop Operator services.	Elizabeth Alvarez
10. Update on the Strategic Plan.	Erik Cushman
11. Update on WIOA Adult, Dislocated Worker, and Youth programs.	Lucy Iracheta Lauren Walters
12. Updates on Executive Committee members' workforce and business activities.	Erik Cushman



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WDB Executive Committee:

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Cesar Lara
Paula Calvetti
Larry Hartman

ANNOUNCEMENTS:	Erik Cushman
ADJOURNMENT	Erik Cushman
SUBCOMMITTEE MEETINGS: Executive: JULY 16, 2026	WDB MEETING JUNE 25, 2026 Erik Cushman
<p>Documents related to agenda items that are distributed to the WDB less than 72 hours before 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, to participate in the public meeting may make these requests to the WDB staff at (831) 796-3505. TTY/CRS: Dial 711.</p>	

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, May 21, 2026

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

Members Absent: Erik Cushman

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

Public Comment: None

Call to Order/Introductions: Vice Chair Cesar Lara called the meeting to order at 9:05 a.m. A quorum was established.

Changes to Agenda: Executive Director Chris Donnelly requested to remove Business Calendar agenda items 5 and 8.

Director's Report: The Executive Director provided updates on the 2026-27 Workforce Innovation and Opportunity Act (WIOA) budget allocation and on the High RoadSM Construction Careers (HRCC) pre-apprenticeship program.

CONSENT CALENDAR:

1. **Action:** Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) Executive Committee meeting on April 16, 2026.
A motion was made by Paula Calvetti to approve the minutes for the Executive Committee meeting on April 16, 2026, seconded by Larry Hartman. Motion passed.

Discussion or Review of Business Calendar Action Items:

1. **ACTION:** Consider and approve staff to execute an agreement with the Laborers' Training & Retraining Trust Fund for Northern California in an amount not to exceed \$19,700 of HRCC funding to support a 20-participant training cycle of the Tri-County Pre-Apprenticeship program.
A motion was made by Paula Calvetti and seconded by Larry Hartman to approve execution of an agreement with the Laborers' Training & Retraining Trust Fund for Northern California in an amount not to exceed \$19,700 of HRCC funding to support a 20-participant training cycle of the Tri-County Pre-Apprenticeship program. Motion passed.
2. **ACTION:** Consider and approve staff to execute a lease agreement with Laborers Local 270 for the use of their facility at 117 Pajaro St. in Salinas for the HRCC Pre-Apprenticeship program for an amount not to exceed \$2,000/month, for a total annual amount of \$24,000, and to forward the lease agreement to County Counsel for review, the Monterey County Board of Supervisors for approval, and the MCWDB for ratification.
A motion was made by Paula Calvetti and seconded by Larry Hartman to approve execution of a lease agreement with Laborers Local 270 for the use of their facility at 117 Pajaro St. in Salinas for the HRCC Pre-Apprenticeship program for an amount not to exceed \$2,000/month, for a total annual amount of \$24,000, and to forward the lease agreement to County Counsel for review, the Monterey County Board of Supervisors for approval, and the MCWDB for ratification. Motion passed.
3. Finance Manager Daisy Fernandez discussed the preliminary 2026-27 budget with the Executive Committee.
4. The Finance Manager provided an update on MCWDB's 2025-2026 3rd Quarter budget.
5. A discussion was held regarding recruitment of new, private sector Board members.
6. The Executive Director and Executive Committee discussed Strategic Plan recommendations.
7. Management Analyst Vanessa Kor provided information on WIOA program performance.
8. Lucy Iracheta from Equus's Adult and Dislocated Worker program, Lourdes Luviano from Equus' Youth program, and Lauren Walters from Turning Point's Youth program provided updates on the WIOA Adult, Dislocated Worker, and Youth programs.
9. Executive Committee members provided updates on workforce and business activities.

Adjournment: Vice Chair Cesar Lara adjourned the meeting at approximately 10:10 a.m.



EXECUTIVE COMMITTEE: 6/18/2026
AGENDA ITEM: 1

MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Approval of Appointment of Isaiah Madrigal,
Representing Business

DATE: June 18, 2026

RECOMMENDATION:

It is recommended that the Executive Committee approve the appointment of Isaiah Madrigal, representing Business, to the Monterey County Workforce Development Board (MCWDB), and that the MCWDB forwards the appointment to the Board of Supervisors for final approval.

BACKGROUND:

Mr. Isaiah Madrigal, Human Resources Generalist, D'Arrigo Bros. Co. of California, has applied for membership to the full Workforce Development Board. As the nominating body, the Executive Committee is asked to consider Mr. Madrigal's application and recommend it for approval at the full Workforce Development Board meeting on June 25, 2026.

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

ATTACHMENTS:

Mr. Madrigal's application

Monterey County Workforce Development Board – Application for Membership

CONTACT INFORMATION

Name:

Isaiah Madrigal

Title:

Human Resources Generalist

Phone:

Email:

City of Residence:

Salinas

BUSINESS INFORMATION

Business Name:

D'Arrigo Bros Co., of California

Business Address:

21777 Harris Rd
Salinas, CA 93908
[Map It](#)

Business Website:

<https://www.andyboy.com/>

Number of Current Employees:

500-1000

Number of Years with Current Business:

4.5 years

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

60+ years

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

I currently work as a Human Resources Generalist for D'Arrigo Bros. Co. of California, a large agricultural company with operations across multiple locations. In my role, I support employees, supervisors, and managers with a wide range of HR functions, including recruitment, onboarding, employee relations, benefits administration, leave management, and HR compliance. A large part of my job involves helping managers navigate workplace issues, answering questions about company policies and procedures, and ensuring employment practices are applied consistently. I also help maintain employee records, support HR systems, and work closely with operations leadership to meet workforce needs in a fast-paced, unionized environment.

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

N/A; I do not hold any type of membership at this moment.

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

Society of Human Resources Management Certified Professional (SHRM-CP)
Masters Degree in Responsible Business (MBA)

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

As a Human Resources Generalist, I am responsible for supporting the day-to-day administration of HR programs and ensuring consistent application of company policies, procedures, and employment practices. My responsibilities include employee relations support, recruitment and onboarding, leave administration, benefits administration, HRIS maintenance, compliance documentation, and providing guidance to employees and managers on HR-related matters. I serve as a resource on company policies, employment laws, and collective bargaining agreements, helping leadership make informed decisions while ensuring compliance and consistency across the organization. While I do not have final policy-making authority, I regularly collaborate with HR leadership and operations management to support workforce initiatives and recommend process improvements.

Monterey County Workforce Development Board

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

By serving on the Monterey County Workforce Development Board, I hope to help identify workforce needs, support practical training and career development opportunities, and contribute to solutions that benefit both employers and job seekers. Throughout my career in human resources, I have seen how important it is for businesses, educational institutions, and community organizations to work together to build a strong talent pipeline. I am particularly interested in helping create pathways that connect students, emerging professionals, and underserved populations with meaningful career opportunities, while also ensuring local employers have access to the skilled workforce they need to grow and succeed. I would welcome the opportunity to share my perspective, learn from other board members, and contribute to initiatives that support the long-term economic growth and success of our community.

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

I bring experience in workforce development, community engagement, and partnerships with educational institutions. Through my HR career, I have collaborated with colleges and universities, including Hartnell College, CSUMB, and other CSU and UC campuses, to support recruitment efforts and connect students and graduates with career opportunities in the agricultural industry. I have also participated in fundraising efforts supporting nonprofit cancer research initiatives. Additionally, my experience in Human Resources has provided me with insight into local workforce needs, recruitment challenges, talent development, and labor market trends, allowing me to contribute a practical employer perspective to workforce discussions and initiatives.

Membership on the Monterey County WDB requires that each member attend a full WDB meeting every two months, attend training sessions for board members and become an advocate for workforce development. The time commitment for these activities ranges from a minimum of 2 to 4 hours per month. Can you make that time commitment?

Yes

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

Yes

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

I wish to serve on the Monterey County Workforce Development Board because I am passionate about supporting workforce development and creating opportunities for individuals to succeed in their careers. Through my experience in Human Resources, I have seen the importance of connecting employers with qualified talent and helping individuals access training and career pathways. I would welcome the opportunity to contribute my perspective, collaborate with local leaders, and help strengthen workforce initiatives that support both businesses and the communities we serve throughout Monterey County

Acknowledgment

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

Date

06/01/2026



EXECUTIVE COMMITTEE: 6/18/2026
AGENDA ITEM: 2

MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Approval of Appointment of Alma Diaz,
Representing Wagner Peyser

DATE: June 18, 2026

RECOMMENDATION:

It is recommended that the Executive Committee approve the reappointment of Alma Diaz, representing Wagner Peyser, to the Monterey County Workforce Development Board (MCWDB), and that the MCWDB forwards the appointment to the Board of Supervisors for final approval.

BACKGROUND:

Ms. Alma Diaz, Field Office Manager, State of California Employment Development Department (EDD), has reapplied for membership to the full Workforce Development Board. As the nominating body, the Executive Committee is asked to consider Ms. Diaz's application and recommend it for approval at the full Workforce Development Board meeting on June 25, 2026.

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

ATTACHMENTS:

Ms. Alma Diaz's application

Monterey County Workforce Development Board – Application for Membership

CONTACT INFORMATION

Name:

Alma Diaz

Title:

Field Office Manager

Phone:

Email:

City of Residence:

Salinas

BUSINESS INFORMATION

Business Name:

Employment Development Department

Business Address:

928 E. Blanco Road, Ste. 280
Salinas, CA 93901
[Map It](#)

Number of Current Employees:

20

Number of Years with Current Business:

17

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

I serve as a Field Office Manager/Employment Program Manager II (EPM II) for the Employment Development Department within the Los Angeles Coastal Division, oversee the Santa Cruz County and Monterey County cluster. In this role, I engage with community members and key stakeholders throughout Monterey County.

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

Serve as board member to the Santa Cruz County Workforce Development Board.

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

As Employment Program Manager II, I am responsible for the programs, personnel and properties of the Employment Development Department (EDD) field office, branches and outstations. I convey and interprets Departmental policies, provides information and technical guidance to the staff and the community thereby assisting efforts to develop the full employment potential of local human resources.

Monterey County Workforce Development Board

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

I hope to continue to represent and promote EDD's mission, goals and values. Continue to develop and manage constructive relationships with customers inside and outside the Department. I hope to continue to enhance the partnership between EDD, Monterey County WDB and community partners and stakeholders.

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

With over 17 years of experience with EDD, I have held a variety of roles within Workforce Services, including which include Employment Program Representative, Case Manager, Trainer, Division Staff, and Employment Program Manager. Throughout my career, I have worked closely with Workforce Innovation and Opportunity Act (WIOA) partners to ensure effective service delivery, referrals and coordination. Additionally, I work with employers, elected officials, educational institutions and other stakeholders to ensure EDD services and programs meet the needs of the communities we serve. I believe my experience and insights would allow me to actively continue to contribute to the board's strategic direction.

Membership on the Monterey County WDB requires that each member attend a full WDB meeting every two months, attend training sessions for board members and become an advocate for workforce development. The time commitment for these activities ranges from a minimum of 2 to 4 hours per month. Can you make that time commitment?

Yes

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

Yes

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

As a partner in the WIOA system, I would like to continue serving on the Monterey County Workforce Development Board because of the vital role community collaboration plays in strengthening our region. Serving on the board offers an opportunity to better support our stakeholders and address the needs of the communities we serve. Being part of the MCWDB provides a valuable platform to network, gain firsthand insights from diverse perspectives, and learn from various industries and community organizations to identify new ways to collaborate. Ultimately, this work enables me to better serve the people who rely on these programs and ensure they receive the support and opportunities they deserve.

Acknowledgment

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

Date

06/03/2026



EXECUTIVE COMMITTEE: 6/18/26
AGENDA ITEM: 3

MEMORANDUM

TO: Monterey County Workforce Development Board Executive Committee

DATE: June 18, 2026

SUBJECT: Approval of the Workforce Development Board’s Fiscal Year 2026-27 Budget

FROM: Daisy Fernandez, Finance Manager

APPROVED BY: Christopher Donnelly _____

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board (MCWDB) Executive Committee review and approve the proposed, preliminary Workforce Innovation and Opportunity Act (WIOA) budget for Fiscal Year (FY) 2026-27.

BACKGROUND:

On May 15, 2026, the State of California Employment Development Department (EDD), Workforce Services Division, released Information Notice WSIN25-32, WIOA Title I formula funding allocations for FY 2026–27 for each of the 45 Local Workforce Development Areas, for the Adult, Dislocated Worker, and Youth programs. It is important to note that the MCWDB receives only 14% of its Adult and Dislocated Workers allocation on July 1, 2026, and the remaining balance on October 1, 2026. The Youth allocation funding is available on July 1 at 100%.

Proposed Budget Based on Projected DOL Funding

TOTAL FUNDING (Pre-Admin)	TOTAL PROGRAM FUNDING (Post-Admin)	AVAILABLE FUNDING (After Required Set-Asides)
\$11,260,099	\$10,483,089	\$8,386,471

Overview

MCWDB’s proposed budget for Program Year (PY) 2026–27 reflects a stable funding environment supported by U.S. Department of Labor (DOL) formula allocations and a carry-in balance from PY 2025–26. Total funding available for the year is projected at \$11,260,099 prior to administrative deductions. After applying the allowable 10% administrative set-aside totaling \$777,010, total program funding equals \$10,483,089.

In accordance with WIOA requirements and State EDD guidance, the budget includes required training and work experience set-asides. These include SB 734 training expenditures for Adult and Dislocated Worker (DW) programs and

Youth Work Experience (WEX) requirements. Combined, these mandatory set-asides total \$2,096,618, leaving \$8,386,471 available to support Adult, DW, and Youth program operations and services.

The proposed budget continues to prioritize personnel, contracted case management services, participant support services, operational infrastructure, compliance oversight, and long-term fiscal stability necessary to maintain workforce services throughout Monterey County.

Sources

Revenue for PY 2026–27 is supported through two primary funding sources:

DOL Formula Allocations — \$7,770,099

- Adult: \$2,218,660
- Dislocated Worker (DW): \$3,263,224
- Youth: \$2,288,215

Carry-In from PY 2025–26 — \$3,490,000

After the allowable 10% administrative set-aside totaling \$777,010, remaining program funds equal \$6,993,089. When combined with carry-in funding, total available program funding equals \$11,260,099

Overall revenue projections remain consistent with historical WIOA funding patterns and current federal formula allocations.

Uses of Funding

Workforce Development Board Personnel Costs — \$1,058,266

Personnel costs are allocated between administrative and program funding in accordance with WIOA cost allocation requirements and staff activities.

The proposed program-funded personnel budget totals approximately \$1,058,266 and reflects salaries and benefits for staff directly supporting program operations and workforce service delivery. Administrative-funded personnel costs associated with fiscal administration, accounting, monitoring, reporting, and compliance oversight are charged to the allowable administrative cost allocation and are not included in the program personnel total.

Personnel expenditures support Workforce Development Board staffing necessary to maintain program operations, participant services, employer engagement, compliance oversight, fiscal management, and workforce system coordination throughout Monterey County.

Non-Personnel Costs — \$1,353,982

Non-personnel expenditures support operational infrastructure and administrative functions necessary to maintain uninterrupted workforce services throughout the local area.

Major expenditures include:

- Rent and facility costs — \$359,958
- Information Technology and Telecommunications — \$287,850
- Countywide Cost Allocation Plan (COWCAP) — \$156,674
- County Counsel — \$45,000
- Other operating costs — \$310,000
- Staff development and training for WDB staff and subcontractors — \$35,000
- Staff travel and conferences — \$12,500
- Workers' Compensation coverage for WIOA participants — \$135,000
- Copy machine rental and printing support — \$12,000

Other Operating Costs Include:

Operational expenses necessary to support daily program administration and service delivery, including office operations, supplies, equipment maintenance, insurance, communications, subscriptions, fiscal administration support, and other general administrative expenditures.

Case Management Contracts and Services — \$2,935,000

Case management and contracted service expenditures support direct participant services and workforce program operations throughout Monterey County.

Funding includes:

- Adult Program Services — \$900,000
- Dislocated Worker Program Services — \$400,000
- Youth Program Services — \$1,500,000
- One-Stop Operator Services — \$135,000

These investments support career services, participant enrollment, case management, employment placement, training coordination, employer engagement, and workforce system operations.

Other Client Related Services — \$710,000

Funding in this category supports direct participant assistance, workforce access, and strategic workforce initiatives.

Major expenditures include:

- Business Services Enhancements — \$230,000
- AJCC Front Desk Staffing (Salinas) — \$175,000
- Educational Training Coordinator — \$130,000
- Youth Individual Training Accounts (ITAs) — \$50,000
- Supportive services for Adult, DW, and Youth participants — \$60,000
- Pre-vocational workshops — \$35,000
- WorkKeys assessments and services — \$30,000

These services are intended to strengthen participant access, improve customer service, support training outcomes, and enhance workforce system coordination.

Other Non-Personnel Costs — \$56,000

This category includes operational technology and software support expenditures necessary for fiscal and program administration.

- Computer annual lease — \$43,000
- MIP accounting software and support services — \$13,000

MIP is the WDB financial management and accounting software used for budget management, fiscal tracking, reporting, and compliance monitoring.

Other Contracts — \$406,900

Other contracted services support workforce system infrastructure, compliance, outreach, and strategic planning activities.

Funding includes:

- ETPL support services
- Program and fiscal monitoring
- Website hosting and maintenance
- Marketing and outreach materials
- Labor market information tools (Chmura and Launchpad)
- Temporary staffing support
- Strategic and programmatic studies

These contracts maintain operational stability, support compliance requirements, enhance public outreach, and assist long-term workforce planning efforts.

Items to Watch

SB 734 and Youth Work Experience Requirements

State and federal workforce regulations require minimum training and work experience expenditures.

Adult and Dislocated Worker Training Requirement (SB 734)

A minimum percentage of Adult and Dislocated Worker funding must be dedicated to direct training services, including:

- Occupational Skills Training
- On-the-Job Training (OJT)
- Transitional Employment
- Other allowable workforce training activities

The projected Adult and DW training set-aside totals approximately \$1,421,244.

Youth Work Experience Requirement

WIOA requires that a minimum of 20% of Youth program funds be expended on paid and unpaid Work Experience (WEX) activities, including internships and On-the-Job Training opportunities.

The projected Youth Work Experience set-aside totals approximately \$675,374.

Combined mandatory training and WEX expenditures total approximately \$2,096,618

These required expenditures will continue to require careful fiscal monitoring to ensure compliance with federal and state performance mandates.

Case Management and Contracted Services

Case management and contracted service categories continue to represent the largest operational expenditure area within the budget. Ongoing oversight and fiscal monitoring will be necessary to ensure expenditure remains aligned with participant outcomes, contract performance, and compliance requirements.

Reserve Utilization — \$1,623,723

The proposed budget maintains a Board-designated reserve balance of \$1,623,723

The reserve is intended to provide fiscal stability in response to ongoing uncertainty surrounding future WIOA formula allocations and potential funding fluctuations at the federal and state levels. Maintaining a prudent reserve allows the Workforce Development Board to sustain current service levels, avoid disruptions in participant services, and ensure operational continuity during periods of delayed allocations or reduced funding.

Remaining Available Funding — \$242,600

Following all planned expenditures and reserve allocations, approximately \$242,600 remains available for future Board-directed initiatives and strategic investments.

WDB staff recommends reserving these funds for priorities identified by the Board and Executive Committee that align with strategic workforce development goals, emerging community needs, program innovation opportunities, and system improvement initiatives.

Staff anticipates presenting recommendations for the use of these funds at the July Executive Committee meeting for review and consideration.

Summary

The PY 2026–27 proposed budget reflects a stable financial position supported by consistent federal funding allocations and carry-in resources from the prior program year. The budget balances operational sustainability, compliance requirements, participant services, and fiscal stability. Required training and work experience set-asides are fully incorporated, core workforce services remain funded, and the proposed reserve position helps protect against future funding uncertainty. Overall, the proposed budget positions the Workforce Development Board to maintain current service levels, continue providing critical workforce services to Monterey County residents and employers, and minimize disruptions in service delivery despite potential fluctuations in future funding levels.

PY 26-27 Proposed budget- based on Projected DOL funding					
Allocations	29%	40%	31%	100%	
	Adult	DW	Youth	100%	
Sources	\$ 2,218,660	\$ 3,263,224	\$ 2,288,215	\$ 7,770,099	
Sources Reduction					
Admin 10%	\$ 221,866	\$ 326,322	\$ 228,822	\$ 777,010	
Program 90%	\$ 1,996,794	\$ 2,936,902	\$ 2,059,394	\$ 6,993,089	
Carry in 25-26	\$ 1,092,021	\$ 1,080,504	\$ 1,317,475	\$ 3,490,000	
				\$ 11,260,099	
Total Funding-Program	\$ 3,088,815	\$ 4,017,406	\$ 3,376,869	\$ 10,483,089	
Use:					(777,010)
SB 734	\$ 617,763	\$ 803,481		\$ 1,421,244	2,096,618
Youth WEX			\$ 675,374	\$ 675,374	(2,096,618)
				\$ 8,386,471	
Available Funding	\$ 2,471,052	\$ 3,213,924	\$ 2,701,495	\$ 8,386,471	
Personnel					
Salaries / Benefits	\$ 1,058,265.82	\$ 1,058,266			
	\$ 1,058,266	\$ 306,897	\$ 423,306	\$ 328,062	\$ 1,058,266
				Personnel	\$ 1,058,266
Non Personnel					
Rent - **	\$ 359,958 **	\$ 104,388	\$ 143,983	\$ 111,587	\$ 359,958
IT& Telecom	\$ 287,850 **	\$ 83,477	\$ 115,140	\$ 89,234	\$ 287,850
COWCAP	\$ 156,674	\$ 45,435	\$ 62,670	\$ 48,569	\$ 156,674
	** 36/42/22				
County Counsel-**	\$ 45,000	\$ 16,200	\$ 18,900	\$ 9,900	\$ 45,000
	** 36/42/22				
Other operating cost**	\$ 310,000 **	\$ 111,600	\$ 130,200	\$ 68,200	\$ 310,000
Staff Development/Training	\$ 35,000	\$ 10,150	\$ 14,000	\$ 10,850	\$ 35,000
Travel -Conference	\$ 12,500	\$ 3,625	\$ 5,000	\$ 3,875	\$ 12,500
	** 40/15/45				
Workers Comp - WDB **	\$ 135,000 ***	\$ 54,000	\$ 20,250	\$ 60,750	\$ 135,000
Copy Machine Rental	\$ 12,000	\$ 3,480	\$ 4,800	\$ 3,720	\$ 12,000
				Non Personnel	\$ 1,353,982
Case Management Contracts					
Adult	\$ 900,000	\$ 900,000		\$ 900,000	
DW	\$ 400,000	\$ 400,000		\$ 400,000	
Youth CM	\$ 1,500,000		\$ 1,500,000	\$ 1,500,000	
One Stop Operator	\$ 135,000	\$ 39,150	\$ 54,000	\$ 41,850	\$ 135,000
			Case Management Contracts	\$ 2,935,000	
Client Related Services					
Youth ITA's	\$ 50,000		\$ 50,000	\$ 50,000	
Supportive Services	\$ 60,000	\$ 20,000	\$ 15,000	\$ 25,000	\$ 60,000
Pre Voc Workshops	\$ 35,000	\$ 12,500	\$ 12,500	\$ 10,000	\$ 35,000
Workkeys	\$ 30,000	\$ 12,500	\$ 8,500	\$ 9,000	\$ 30,000
Other client Related Services					
Business Services Enhancements	\$ 230,000	\$ 100,000	\$ 130,000	\$ 230,000	
AJCC Front Desk Staff -Salinas	\$ 175,000 *	\$ 87,500	\$ 87,500	\$ 175,000	
Educational Training Coordinator	\$ 130,000 *	\$ 65,000	\$ 65,000	\$ 130,000	
			Other client Related Services	\$ 710,000	
Other Non Personnel					
	** 36/42/22				
Computers Annual lease **	\$ 43,000 **	\$ 15,480	\$ 18,060	\$ 9,460	\$ 43,000
MIPs	\$ 13,000	\$ 3,770	\$ 5,200	\$ 4,030	\$ 13,000
			Other Non Personnel	\$ 56,000	
Contracts -other					
Brennan -T/A- ETPL	\$ 44,000 *	\$ 17,255	\$ 17,490	\$ 9,255	\$ 44,000
Brennan Monitoring -Program / Fiscal	\$ 45,000	\$ 13,050	\$ 18,000	\$ 13,950	\$ 45,000
PDDG -Webhosting	\$ 57,900	\$ 16,791	\$ 23,160	\$ 17,949	\$ 57,900
PDDG -Development of Marketing Materials	\$ 75,000	\$ 21,750	\$ 30,000	\$ 23,250	\$ 75,000
Studies	\$ 75,000 *	\$ 29,750	\$ 30,500	\$ 14,750	\$ 75,000
Outreach materials	\$ 75,000 *	\$ 29,750	\$ 30,500	\$ 14,750	\$ 75,000
Slingshot Temp Staffing	\$ 20,000	\$ 5,800	\$ 8,000	\$ 6,200	\$ 20,000
Chura	\$ 9,000	\$ 2,640	\$ 3,600	\$ 2,760	\$ 9,000
Launchpad	\$ 6,000	\$ 1,740	\$ 2,400	\$ 1,860	\$ 6,000
*Reserves	\$ 1,623,723	\$ 907,404	\$ 1,116,265	\$ 200,054	\$ 1,623,723
Available funding for PY27 -Program Services	\$ 242,600	\$ 30,000	\$ 200,000	\$ 12,600	\$ 242,600
			Contracts/Reserves	\$ 2,273,223	
Totals	\$ 8,386,471	\$ 2,471,052	\$ 3,213,924	\$ 2,701,495	\$ 8,386,471
	\$ 0	\$ 0	\$ (0)	\$ 0	
	\$ 2,471,052	\$ 3,213,924	\$ 2,701,495	\$ 8,386,471	
	\$ -	\$ -	\$ -	\$ -	
				\$ 1,623,723	Carry in FY 28

*Other Contracts *Total \$406,900



MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Approval to Extend Equus Adult and Dislocated Worker Agreement

DATE: June 18, 2026

RECOMMENDATION:

It is recommended that the Executive Committee approves extending the existing agreement with Arbor E&T, dba Equus Workforce Solutions, to provide WIOA Title 1 Adult and Dislocated Worker case management services within the local workforce development area from July 1, 2026, through June 30, 2027, in an amount not to exceed \$1,300,000, with \$900,000 provided to serve 337 Adults and \$400,000 to serve 75 Dislocated Workers.

BACKGROUND:

Following a Request for Proposal (RFP) process in early 2023, Equus was approved to provide training and employment services to Adults and Dislocated Workers in Monterey County from July 1, 2023, through June 30, 2024, with case management funding in the amount of \$2,050,000 to serve 375 Adults and 125 Dislocated Workers. In July 2024, the Board-approved allocation for Adult and Dislocated Worker case management was decreased to \$1,900,000 to serve 425 Adults and 75 Dislocated Workers in 2024-25. The 2025-26 allocation was further decreased to \$1,300,000 to serve 293 Adults and 75 Dislocated Workers.

Last year, in coordination with Monterey County Workforce Development Board (MCWDB) Youth program case managers, Equus staff collaborated with Adult and Dislocated Worker participants to support their preparation for Certified Nursing Assistant (CNA) training. Working closely with the MCWDB's designated Management Analyst, Equus also supported Adult and Dislocated Worker participants enrolled in Community Health Worker (CHW) training. In addition, Equus staff also provided case management services to support MCWDB's Prison to Employment 2.0 program, assisting justice-involved individuals to find training and employment. Finally, Equus enrolled and worked with participants in MCWDB's regional pre-apprenticeship program, which provides 350 hours of hands-on training, including the Multi-Craft Core Curriculum (MC3).

DISCUSSION:

For the coming program year, Equus will prioritize compliance with SB 734 training expenditure requirements by expanding employer engagement efforts to increase Transitional Jobs (TJ) and On-the-Job Training (OJT) opportunities. A key focus will be the continued implementation and refinement of the redesigned Adult and Dislocated Worker Service Delivery Model to improve participant engagement, service effectiveness, and employment outcomes. MCWDB expects Equus to enhance services through targeted in-person workshops and virtual training opportunities aligned with MCWDB's priority industry sectors and high-demand occupations. Additionally, Equus is expected to strengthen partnerships with employers to expand direct placement opportunities in MCWDB's priority sectors.

Staff recommends executing an amendment with Equus for Adult and Dislocated Worker services in 2026-27 to serve a total of 412 individuals (337 Adults and 75 Dislocated Workers), with \$900,000 allocated to the Adult program and \$400,000 for Dislocated Worker. MCWDB expects to release a Request for Proposals (RFP) for Adult and Dislocated Worker services in January 2027 with an anticipated contract start date of July 1, 2027.

It should also be noted that on April 23, 2026, MCWDB authorized the transfer of \$900,000 of Dislocated Worker funding to the Adult program based on continuing to see lower numbers of Dislocated Workers.

NEXT STEPS:

If the recommendation to extend the WIOA Adult and Dislocated Worker services agreement with Equus is approved by the Executive Committee, it will be forwarded to the full Board for consideration at its June 25, 2026, meeting.



MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Approval to Extend Equus Youth Agreement

DATE: June 18, 2026

RECOMMENDATION:

It is recommended that the Executive Committee approves extending the existing agreement with Arbor E&T, LLC, dba Equus Workforce Solutions, to provide Youth case management services with Workforce Innovation and Opportunity Act (WIOA) and non-WIOA funds in an amount not to exceed \$350,000 to serve 49 youth in the northern portion of Monterey County, for an agreement term of July 1, 2026, to December 31, 2026.

BACKGROUND:

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

Equus was selected to provide WIOA Youth services following an RFP process in early 2022 in which only one proposal was received, and based on a sole-source recommendation, Equus was approved to provide WIOA services to youth in the northern portion of Monterey County from July 1, 2022, through June 30, 2023. The 2022-23 agreement executed with Equus was amended in 2023-24 to provide \$750,000 for WIOA case management services for 97 youth. Last year, the agreement was again amended to provide \$650,000 to serve a total of 90 participants.

In 2025-26, Equus and Turning Point case managers worked collaboratively to advance several MCWDB initiatives. The Youth Programs partnered to provide the Green Cadre program using CaliforniansForAll funding for ongoing cohorts that continue serving Monterey County residents by addressing critical community needs related to food insecurity and climate resilience.

Additionally, WIOA funding was used to expand workforce development opportunities through a variety of internships and training programs. These initiatives included aerospace manufacturing internships with Joby Aviation, Certified Nursing Assistant (CNA) training through Central Coast College, and specialized cohorts focused on hospitality and social media. These opportunities provided participants with valuable career pathways, industry-recognized skills, and hands-on work experience aligned with local workforce needs.

DISCUSSION:

In accordance with U.S Department of Labor procurement requirements, which require service providers to be competitively procured every four to five years, and to align procurement timelines for

both the Adult and Dislocated Worker programs and the Youth programs, staff recommends approval of a six-month amendment to the Youth services agreement with Equus in the amount of \$350,000. The amendment will support the provision of case management and workforce development services to 49 youth participants in North Monterey County during Fiscal Year 2026-27.

A key focus of the extension will be expanding employer engagement efforts to increase the availability of Work Experience (WEX) opportunities and direct employment placements, thereby strengthening career pathways and employment outcomes for youth participants. MCWDB expects to release a Request for Proposals (RFP) for Youth services in late July or early August. It is anticipated that the results of the 2026 Youth Services RFP process will be announced in October 2026.

NEXT STEPS:

If the recommendation to extend the Youth services agreement with Equus is approved by the Executive Committee, it will be forwarded to the full board for consideration at its June 25, 2026, meeting.

MEMORANDUM

TO: Workforce Development Board Executive Committee

FROM: Christopher Donnelly

SUBJECT: Approval to Extend Turning Point Youth Agreement

DATE: June 18, 2026

RECOMMENDATION:

It is recommended that the Executive Committee approves extending the existing agreement with Turning Point of Central California, Inc. to provide Youth case management services with Workforce Innovation and Opportunity (WIOA) and non-WIOA funds in an amount not to exceed \$350,000 to serve 49 youth in the southern portion of Monterey County, for an agreement term of July 1, 2026, to December 31, 2026.

BACKGROUND:

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

Turning Point, a private non-profit, was selected to provide WIOA Youth services following a competitive RFP process in early 2022 in which Turning Point was approved to provide WIOA services to youth in the southern portion of Monterey County from July 1, 2022, through June 30, 2023. The 2022-23 agreement executed with Turning Point was amended for 2023-24 to provide \$750,000 for WIOA case management services for 97 youth. Last year, the agreement was again amended to provide \$700,000 to serve a total of 95 participants.

In 2025-26, Turning Point and Equus Workforce Solutions case managers worked collaboratively to advance several MCWDB initiatives. The Youth Programs partnered to provide the Green Cadre program using CaliforniansForAll funding for ongoing cohorts that continue serving Monterey County residents by addressing critical community needs related to food insecurity and climate resilience.

Additionally, WIOA funding was used to expand workforce development opportunities through a variety of internships and training programs. These initiatives included aerospace manufacturing internships with Joby Aviation, Certified Nursing Assistant (CNA) training through Central Coast College, and specialized cohorts focused on hospitality and social media. These opportunities provided participants with valuable career pathways, industry-recognized skills, and hands-on work experience aligned with local workforce needs.

DISCUSSION:

In accordance with U.S Department of Labor procurement requirements, which require service providers to be competitively procured every four to five years, and to align procurement timelines for

both the Adult and Dislocated Worker programs and the Youth programs, staff recommends approval of a six-month amendment to the Youth services agreement with Equus in the amount of \$350,000. The amendment will support the provision of case management and workforce development services to 49 youth participants in North Monterey County during Fiscal Year 2026-27.

A key focus of the extension will be expanding employer engagement efforts to increase the availability of Work Experience (WEX) opportunities and direct employment placements, thereby strengthening career pathways and employment outcomes for youth participants. MCWDB expects to release a Request for Proposals (RFP) for Youth services in late July or early August. It is anticipated that the results of the 2026 Youth Services RFP process will be announced in October 2026.

NEXT STEPS:

If the recommendation to extend the WIOA Youth services agreement with Turning Point is approved by the Executive Committee, it will be forwarded to the full board for consideration at its June 18, 2025, meeting.

Monterey County Workforce Development Board (MCWDB) Program Year 2025–2026 Budget and Expenditure Update

Funding Overview

MCWDB has **\$9,070,228** in available Program Year (PY) 2025–2026 program funding, net of the administrative allocation. This amount includes \$2,131,517 in carry-in funds from prior program years.

In addition, MCWDB has a separate **administrative allocation of \$770,968**, bringing total available resources to **\$9,841,196**.

Expenditures Through April 2026

Program expenditures from July 2025 through April 2026 total **\$4,647,602**, allocated as follows:

- **Adult (AD):** \$1,950,060
- **Dislocated Worker (DW):** \$1,117,344
- **Youth (YTH):** \$1,580,198

Case management expenditures are included through February 2026.

As of April 2026, MCWDB has expended approximately **51.2% of available program funding** (\$4,647,602 of \$9,070,228).

Projected Expenditures Through June 2026

Based on current expenditure trends, projected year-end expenditures are:

Funding Stream	Projected Expenditures
Adult	\$2,340,072
Dislocated Worker	\$1,340,813
Youth	\$1,896,238
Program Total	\$5,577,123
Administration	\$495,331
Total Projected Expenditures	\$6,072,454

Projected Utilization

Program Funds

- Available Program Funding: **\$9,070,228**
- Projected Program Expenditures: **\$5,577,123**
- Projected Remaining Balance: **\$3,493,105**
- Projected Utilization Rate: **61.5%**

Administrative Funds

- Administrative Funding Available: **\$770,968**
- Projected Administrative Expenditures: **\$495,331**
- Projected Remaining Balance: **\$275,637**
- Projected Utilization Rate: **64.2%**

Areas of Concern

1. Spending Below Planned Levels

Approximately 75% of the program year has elapsed, yet only 51.2% of available program funding has been expended. Based on current expenditure trends, MCWDB is projected to utilize approximately 61.5% of available program funding by year-end, indicating a slower-than-anticipated expenditure pace.

2. Lower Dislocated Worker Utilization

Dislocated Worker expenditures continue to lag behind Adult and Youth expenditures. At current rates, DW funding is projected to remain significantly underutilized at year-end, warranting continued monitoring of enrollment and service delivery activity.

3. Significant Unexpended Program Funds

MCWDB is projected to leave approximately **\$3.49 million in program funding unexpended** at the end of PY 2025–2026, including carry-in funds.

4. Need for Increased Program Activity

To maximize available resources and support workforce development objectives, expenditures will need to accelerate during the remainder of the program year. Continued monitoring of enrollments, training expenditures, supportive services, and contracted services is recommended.

Program Year 2026–2027 DOL Formula Allocations

MCWDB is projected to leave approximately **\$3.49 million** in Program Year (PY) 2025–2026 program funding unexpended at year-end, inclusive of carry-in funds. When combined with the Program Year 2026–2027 U.S. Department of Labor formula allocations of **\$7,770,099**, total available program resources for the FY 2026–2027 cycle are projected to be approximately **\$11,260,099**.

BUDGET FY 2025-26

	Available funding	\$ 9,070,228
	Projected Total Program Expenses FY26	\$ 9,339,931
	Variance	\$ (269,704)

Income		Allocation		34%		34%		34%		Total Expenditures	Available		
		Admin	Staff	Adult	DW	Youth	Youth	Total					
Funding	Admin	FY Budget	Adult	Adult Expenditures	DW	DW Expenditures	Youth	Youth Expenditures	Total	Total Expenditures	Available		
	Admin 10% Program 90%		\$ 2,537,272.00	\$ 2,591,113.00	\$ 2,591,113.00	\$ 165,064	\$ 2,581,293	\$ 135,345	\$ 7,709,678	\$ 412,776	\$ 358,192		
	Carry-in 23 24 Budget		\$ 2,283,545	\$ 112,367	\$ 232,002		\$ 2,323,164		\$ 770,968	\$ 6,938,710			
	Total Funding		\$ 554,430	\$ 475,127			\$ 1,101,961		\$ 2,131,517				
	Use's		\$ 9,070,228	\$ 2,837,975	\$ 2,807,128		\$ 3,425,125		\$ 9,070,228				
	SB 734 Youth WEX	8100, 8110, 8120, 8130, 8140		\$ 685,063	\$ 379,735	\$ 699,601	\$ 28,967	\$ 464,633	\$ 91,116	\$ 1,384,664	\$ 408,701	\$ 975,963	
	Available Funding for Adult, DW and Youth		\$ 7,220,931	\$ 2,152,911	\$ 379,735	\$ 2,307,528	\$ 28,967	\$ 2,960,492	\$ 91,116	\$ 7,220,931	\$ 499,817	\$ 6,721,113	
Expenses													
Personnel		Staff	Temp	Sub Total									
	Salaries	5102, 5130, 5920, 5960		\$ 1,654,671									
	Salaries/ Benefits Total			\$ 1,654,671	\$ 546,041	\$ 183,715	\$ 562,588	\$ 218,154	\$ 546,041	\$ 190,538	\$ 1,654,671	\$ 592,407	\$ 1,062,264
Case Management		8501											
	Adult			\$ 900,000	\$ 900,000	\$ 764,977			\$ 900,000	\$ 764,977	\$ 135,023		
	DW			\$ 400,000			\$ 400,000	\$ 249,502	\$ 400,000	\$ 249,502	\$ 150,498		
	Youth CM			\$ 1,350,000				\$ 1,350,000	\$ 863,898	\$ 1,350,000	\$ 486,102		
	CM FY25												
	One Stop Operator			\$ 334,532	\$ 110,396	\$ 63,102	\$ 113,741	\$ 57,186	\$ 110,396	\$ 67,046	\$ 187,333	\$ 147,199	
				\$ 2,984,532	\$ 1,010,396	\$ 828,079	\$ 813,741	\$ 306,688	\$ 1,460,396	\$ 930,943	\$ 2,984,532	\$ 2,065,710	\$ 918,822
Client Related Services													
	Youth ITA's			\$ 60,000				\$ 60,000	\$ 1,085	\$ 60,000	\$ 1,085	\$ 58,915	
	Supportive Services	8220, 8213, 8216, 8250, 8350, 8320		\$ 45,000	\$ 14,850	\$ 750	\$ 15,300		\$ 14,850	\$ 219	\$ 45,000	\$ 969	\$ 44,031
	Pre Voc Workshops	6120		\$ 20,000	\$ 6,600	\$ 800	\$ 6,800	\$ 400	\$ 6,600	\$ 700	\$ 20,000	\$ 1,900	\$ 18,100
	WorkKeys	6120		\$ 18,000	\$ 9,940	\$ 4,928	\$ 6,120	\$ 1,647	\$ 9,940	\$ 4,158	\$ 18,000	\$ 10,233	\$ 7,768
				\$ 143,000	\$ 27,350	\$ 6,478	\$ 28,220	\$ 2,047	\$ 87,390	\$ 6,162	\$ 143,000	\$ 34,886	\$ 108,114
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	\$ 335,000	\$ 225,909	\$ 209,091		
Non Personnel													
	Rent -	6400, 7822		\$ 336,089	\$ 110,909	\$ 73,522	\$ 114,270	\$ 73,522	\$ 110,909	\$ 51,312	\$ 336,089	\$ 198,357	\$ 137,732
	ITD	6603		\$ 272,000	\$ 89,760	\$ 62,425	\$ 92,480	\$ 40,393	\$ 89,760	\$ 51,409	\$ 272,000	\$ 154,226	\$ 117,774
	COWCAP	6100, 7301		\$ 192,975	\$ 63,682	\$ 59,377	\$ 65,612	\$ 44,533	\$ 63,682	\$ 29,688	\$ 192,975	\$ 133,598	\$ 59,377
	County Counsel	6607		\$ 45,000	\$ 14,850	\$ 3,545	\$ 15,300	\$ 3,545	\$ 14,850	\$ 1,764	\$ 45,000	\$ 8,854	\$ 36,146
	Other Operating Cost	1, 6421, 6505, 6540, 6570, 6572, 6920, 6930, 9200, 6120, 6550, 6409		\$ 269,500	\$ 88,935	\$ 59,484	\$ 91,630	\$ 55,127	\$ 88,935	\$ 55,879	\$ 269,500	\$ 170,491	\$ 99,009
	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	6020, 6031		\$ 12,500	\$ 4,125		\$ 4,250		\$ 4,125		\$ 12,500		\$ 12,500
	Workers Comp - WOB			\$ 95,000	\$ 31,350		\$ 32,300		\$ 31,350		\$ 95,000		\$ 95,000
	Copy Machine Rental	6420		\$ 10,000	\$ 3,300		\$ 3,400		\$ 3,300		\$ 10,000		\$ 10,000
	Calendar/ Texting Tools			\$ 15,000	\$ 4,950		\$ 5,100		\$ 4,950		\$ 15,000		\$ 15,000
				\$ 1,293,064	\$ 426,711	\$ 264,494	\$ 439,642	\$ 223,261	\$ 426,711	\$ 194,940	\$ 1,293,064	\$ 682,695	\$ 610,369
Other Non Personnel													
	Computer Annuals Lease			\$ 35,000	\$ 11,550	\$ 13,473	\$ 11,900	\$ 13,624	\$ 11,550	\$ 6,301	\$ 35,000	\$ 33,397	\$ 1,603
	MIPs	6,821		\$ 13,000	\$ 4,290	\$ 4,417	\$ 4,420	\$ 4,417	\$ 4,290	\$ 2,524	\$ 13,000	\$ 11,358	\$ 1,642
				\$ 48,000	\$ 15,840	\$ 17,890	\$ 16,320	\$ 18,040	\$ 15,840	\$ 8,825	\$ 48,000	\$ 44,754	\$ 3,246
Contracts - other													
	T/A - ETPL	6613		\$ 10,000	\$ 3,300	\$ 3,216	\$ 3,400	\$ 3,216	\$ 3,300	\$ 788	\$ 10,000	\$ 7,219	\$ 2,781
	Colleen			\$ 40,000	\$ 13,200	\$ 13,650	\$ 13,600	\$ 13,650	\$ 13,200	\$ 6,825	\$ 40,000	\$ 34,125	\$ 5,875
	Monitoring			\$ 40,000	\$ 13,200	\$ 12,038.75	\$ 13,600	\$ 10,115.00	\$ 13,200	\$ 6,463.00	\$ 40,000	\$ 28,617	\$ 11,383
	Webhosting	PDDG Comm		\$ 45,000	\$ 14,850	\$ 9,515.84	\$ 15,300	\$ 9,259.34	\$ 14,850	\$ 4,856.07	\$ 45,000	\$ 23,631	\$ 21,369
	Outreach	PDDG WEB		\$ 25,000	\$ 8,250	\$ 5,062	\$ 8,500	\$ 5,062	\$ 8,250	\$ 2,530	\$ 25,000	\$ 12,654	\$ 12,346
	Studies			\$ 45,000	\$ 14,850	\$ 867.00	\$ 15,300	\$ 867.00	\$ 14,850	\$ 867.00	\$ 45,000	\$ 2,601	\$ 42,399
	Outreach materials			\$ 15,000	\$ 4,950		\$ 5,100		\$ 4,950		\$ 15,000		\$ 15,000
	Slingshot Temp Staffing			\$ 9,000	\$ 2,970		\$ 3,060		\$ 2,970		\$ 9,000		\$ 9,000
	Chumura			\$ 32,000	\$ 10,560		\$ 10,880		\$ 10,560		\$ 32,000		\$ 32,000
	Launch Pad			\$ 770,968	\$ 254,419		\$ 262,129		\$ 254,419		\$ 770,968		\$ 770,968
	15% Board mandated Reserve			\$ 1,231,968	\$ 404,549	\$ 44,349	\$ 350,869	\$ 42,160	\$ 404,549	\$ 22,320	\$ 1,231,968	\$ 308,846	\$ 923,121
	Available Funding for Adult, DW and Youth after use's		\$ 7,220,931	\$ 2,152,911	\$ 1,837,693	\$ 2,107,528	\$ 952,280	\$ 2,960,492	\$ 1,444,853	\$ 7,220,931	\$ 4,234,825	\$ 2,986,105	
	Budgeted for program expenses FY26		\$ 7,490,235	\$ 2,511,477	\$ 1,457,958	\$ 2,057,280	\$ 923,313	\$ 2,921,477	\$ 1,353,737	\$ 7,490,235	\$ 3,735,008	\$ 3,755,227	
	Admin Expense			\$ 112,367			\$ 165,064		\$ 135,345	\$ 770,968	\$ 412,776	\$ 358,192	
	Total-Expenditures			\$ 1,950,060		\$ 1,117,344		\$ 1,580,398		Program Expenditures July-Apr	\$ 4,234,825	\$ 4,234,825	
										Admin Expenditures July-Apr	\$ 412,776	\$ 412,776	
										Total-Expenditures	\$ 4,647,602	\$ 4,647,602	

Update on WIOA Adult, Dislocated Worker, and Youth Program Performance

Management Analyst Vanessa Kor will provide an update on WIOA performance in the areas below, followed by commentary from the Project Directors.

A. Adult / Dislocated Worker Programs

1. New Enrollments
2. Placed in Occupational Skills Training (OST) or On-the-Job Training (OJT) / Transitional Job (TJ)
3. Achieved Measurable Skills Gain (MSG) in OST or OJT / TJ
4. Completed OST
5. Completed OST w/ MSG + Credential
6. Completed OJT / TJ
7. Placed in Employment Post-OST Completion in Area of Training
8. Placed in Employment in Priority Industry Sector w/o OST
9. PY 24-25 Carryover
10. PY 24-25 Carryover Placed in Employment in Priority Industry Sector through Q1

B. Youth Programs

1. New Enrollments
2. Placed in Paid Work Experience (WEX) or On-the-Job Training (OJT)
3. Completed WEX / OJT or Placed in Employment Prior to Completion
4. Completed OSHA 10, Hazwoper-Basic, and Food Handler Training (Green Cadre)
5. Placed in Occupational Skills Training (OST)
6. Completed OST w/ MSG + Credential
7. Placed in Employment in Priority Industry Sector (Mainstream)
8. Placed in Employment in Priority Industry Sector (Cadre)
9. PY 24-25 Carryover Placed in Employment in Priority Industry Sector through Q1
10. Placed in Employment in Non-Profits and Local / State Government (Green Cadre)

MCWDB WIOA Performance Overview
Title I - Adult Program
PY 25-26

Reporting Period: July 1, 2025 - May 31, 2026

ADULT PROGRAM		Current Total	PY 25-26 Goal	% of Goal
1	New Enrollments	211	293	72%
2	Placed in Occupational Skills Training (OST) or On-the-Job Training (OJT) / Transitional Job (TJ)	64	---	---
	OST	20	---	---
	OJT / TJ	44	---	---
3	Achieved Measurable Skills Gain (MSG) in OST or OJT / TJ¹	23	64	36%
4	Completed OST	10	---	---
5	Completed OST w/ MSG + Credential²	10	16	63%
6	Completed OJT / TJ³	11	40	28%
7	Placed in Employment Post-OST Completion in Area of Training⁴	11	9	129%
	Agriculture	0		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	1		
	Healthcare / Social Assistance	3		
	Hospitality / Tourism	0		
	Transportation / Logistics	7		
	Non-Priority Industry Sector	0	---	---
8	Placed in Employment in Priority Industry Sector w/o OST⁵	17	113	15%
	Agriculture	0		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	1		
	Healthcare / Social Assistance	5		
	Hospitality / Tourism	3		
	Transportation / Logistics	8		
	Non-Priority Industry Sector	9	---	---
9	PY 24-25 Carryover	136	---	---
10	PY 24-25 Carryover Placed in Employment in Priority Industry Sector through Q1⁶	11	109	10%
	Agriculture	1		
	Construction	3		
	Fire (Finance, Insurance, Real Estate)	1		
	Healthcare / Social Assistance	2		
	Hospitality / Tourism	1		
	Transportation / Logistics	3		
	Non-Priority Industry Sector	7	---	---

¹ 100% of participants placed in OST and OJT.

² 80% of participants placed in OST.

³ 90% of participants placed in OJT.

⁴ 85% of participants who complete OST.

⁵ 77% of participants not placed in training.

⁶ 80% of carryover.

64 x 100%
20 x 80%
44 x 90%
10 x 85%
(211-64) x 77%
136 x 80%

MCWDB WIOA Performance Overview
Title I - Dislocated Worker Program
PY 25-26

Reporting Period: July 1, 2025 - May 31, 2026

DISLOCATED WORKER PROGRAM		Current Total	PY 25-26 Goal	% of Goal
1	New Enrollments	45	75	60%
2	Placed in Occupational Skills Training (OST) or On-the-Job Training (OJT) / Transitional Job (TJ)	2	---	---
	OST	2	---	---
	OJT / TJ	0	---	---
3	Achieved Measurable Skills Gain (MSG) in OST or OJT / TJ¹	1	2	50%
4	Completed OST	1	---	---
5	Completed OST w/ MSG + Credential²	1	2	63%
6	Completed OJT / TJ³	0	0	#DIV/0!
7	Placed in Employment Post-OST Completion in Area of Training⁴	1	1	118%
	Agriculture	0		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	0		
	Healthcare / Social Assistance	0		
	Hospitality / Tourism	0		
	Transportation / Logistics	1		
	Non-Priority Industry Sector	0		
8	Placed in Employment in Priority Industry Sector w/o OST⁵	3	34	9%
	Agriculture	0		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	1		
	Healthcare / Social Assistance	2		
	Hospitality / Tourism	0		
	Transportation / Logistics	0		
	Non-Priority Industry Sector	9		
9	PY 24-25 Carryover	18	---	---
10	PY 24-25 Carryover Placed in Employment in Priority Industry Sector through Q1⁶	3	15	20%
	Agriculture	2		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	0		
	Healthcare / Social Assistance	0		
	Hospitality / Tourism	0		
	Transportation / Logistics	1		
	Non-Priority Industry Sector	3		

¹ 100% of participants placed in OST and OJT.

² 80% of participants placed in OST.

³ 90% of participants placed in OJT.

⁴ 85% of participants who complete OST.

⁵ 79% of participants not placed in training.

⁶ 85% of carryover.

2 X 100%

2 x 80%

0 X 90%

1 x 85%

(45-2) x 79%

18 x 85%

MCWDB WIOA Performance Overview
Title I - Youth N Program
PY 25-26

Reporting Period: July 1, 2025 - May 31, 2026

YOUTH N PROGRAM		Current Total	PY 25-26 Goal	% of Goal
1	New Enrollments	64	90	71%
	Mainstream	37	28	132%
	Cadre	6	38	16%
	Green Cadre	21	24	88%
2	Placed in Paid Work Experience (WEX) or On-the-Job Training (OJT)	28	65	43%
	Mainstream	6	19	32%
	Cadre	1	25	4%
	Green Cadre	21	21	100%
3	Completed WEX / OJT or Placed in Employment Prior to Completion	3	39	8%
	Mainstream	0	16	0%
	Cadre	3	23	13%
4	Completed OSHA 10, Hazwoper-Basic, and Food Handler Training (Green Cadre)	18	22	82%
5	Placed in Occupational Skills Training (OST)	8	24	33%
	Mainstream	2	3	67%
	Cadre	6	21	29%
6	Completed OST w/ MSG + Credential	6	20	30%
	Mainstream	0	2	0%
	Cadre	6	18	33%
7	Placed in Employment in Priority Industry Sector or CBO (Mainstream)	4	20	20%
	Agriculture	1		
	Construction	1		
	Fire (Finance, Insurance, Real Estate)	0		
	Healthcare / Social Assistance	0		
	Hospitality / Tourism	2		
	Transportation / Logistics	0		
	Non-Priority Industry Sector	6	---	---
8	Placed in Employment in Priority Industry Sector or CBO (Cadre)	0	32	0%
	Agriculture	0		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	0		
	Healthcare / Social Assistance	0		
	Hospitality / Tourism	0		
	Transportation / Logistics	0		
	Non-Priority Industry Sector	0	---	---
9	PY 24-25 Carryover Placed in Employment in Priority Industry Sector through Q1	3	17	18%
	Agriculture	0		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	0		
	Healthcare / Social Assistance	3		
	Hospitality / Tourism	0		
	Transportation / Logistics	0		
	Non-Priority Industry Sector	2	---	---
10	Placed in Employment in Non-Profits and Local / State Government (Green Cadre)	0	18	0%

MCWDB WIOA Performance Overview
Title I - Youth S Program
PY 25-26

Reporting Period: July 1, 2025 - May 31, 2026

YOUTH S PROGRAM		Current Total	PY 25-26 Goal	% of Goal
1	New Enrollments	96	95	101%
	Mainstream	57	30	190%
	Cadre	11	41	27%
	Green Cadre	28	24	117%
2	Placed in Paid Work Experience (WEX) or On-the-Job Training (OJT)	48	68	71%
	Mainstream	9	20	45%
	Cadre	15	27	56%
	Green Cadre	24	21	114%
3	Completed WEX / OJT or Placed in Employment Prior to Completion	15	41	37%
	Mainstream	12	17	71%
	Cadre	3	24	13%
4	Completed OSHA 10, Hazwoper-Basic, and Food Handler Training (Green Cadre)	19	22	86%
5	Placed in Occupational Skills Training (OST)	32	26	123%
	Mainstream	11	4	275%
	Cadre	21	22	95%
6	Completed OST w/ MSG + Credential	29	22	132%
	Mainstream	13	3	433%
	Cadre	16	19	84%
7	Placed in Employment in Priority Industry Sector or CBO (Mainstream)	6	21	29%
	Agriculture	0		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	0		
	Healthcare / Social Assistance	6		
	Hospitality / Tourism	0		
	Transportation / Logistics	0		
	Non-Priority Industry Sector	5	---	---
8	Placed in Employment in Priority Industry Sector or CBO (Cadre)	0	34	0%
	Agriculture	0		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	0		
	Healthcare / Social Assistance	0		
	Hospitality / Tourism	0		
	Transportation / Logistics	0		
	Non-Priority Industry Sector	0	---	---
9	PY 24-25 Carryover Placed in Employment in Priority Industry Sector through Q1	5	22	23%
	Agriculture	1		
	Construction	0		
	Fire (Finance, Insurance, Real Estate)	1		
	Healthcare / Social Assistance	2		
	Hospitality / Tourism	0		
	Transportation / Logistics	1		
	Non-Priority Industry Sector	3	---	---
10	Placed in Employment in Non-Profits and Local / State Government (Green Cadre)	0	18	0%

One Stop Operator Update

Elizabeth Alvarez of Equus Workforce Solutions will provide a One Stop Operator update.

Discussion on the Monterey County Workforce Development Board (MCWDB) 2026-2028 Strategic Plan

The Executive Committee Chair will discuss updates to the MCWDB's Strategic Plan.

Per the Board's request, the 2026-2028 Strategic Plan document that was presented at the Board meeting of April 23, 2026, has been revised based on the observation that, while "apprenticeship" is mentioned several times in the text and table, it was not clear that what is being discussed in the Strategic Plan and supported by the MCWDB is Department of Labor-approved, certified apprenticeship. This clarification has been provided in the document.



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 Department of Labor-approved, certified 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 certified 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 certified 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 certified apprenticeship programs.
- Q6–Q7: Link education and industry partners to develop WDB-led, certified apprenticeship programs.
- Q8: Launch certified 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 certified 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 certified 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 certified apprenticeship program in one key industry. Secure funding and resources	Develop WDB-led certified apprenticeship programs with employer partners. Implement mentorship and career coaching components.	Launch certified 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 AgTech, DART, and Green Jobs. Begin mapping current educational & certified apprenticeship programs.	Identify target employers for certified apprenticeship and training programs.	Draft initial certified 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, certified 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 & Certified 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 certified 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 certified 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, certified 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 certified 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.

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

Adult and Dislocated Worker Program

As the program year wraps up, Adult and Dislocated Worker staff remain focused on matching participants with employment opportunities that align with their skills, goals, and career interests. The team is also prioritizing the accurate and timely documentation of employment outcomes in CalJOBS to ensure that participant progress, placements, and performance outcomes are properly captured.

Equus' Adult and Dislocated Worker program continues to support active On-the-Job Training placements, finalize Class A training completions, and coordinate Transitional Job internship opportunities that provide participants with hands-on work experience and pathways to long-term employment. Staff are also closely tracking OJT completions as participants successfully reach the end of their training plans and transition into continued employment opportunities.

Looking ahead to July 1 and the first quarter of the new program year, the team is focused on improving support for new participants, planning outreach, strengthening the intake process, and increasing community engagement. Additional administrative support has been added to assist with outreach and intake coordination and overall program operations.

The program has also expanded service offerings through increased workshops at the Salinas Career Center and by offering workshops at Monterey Adult School to broaden access for participants and community members. These efforts support continued engagement, career readiness, and stronger connections to workforce services.

As part of the end-of-year reflection process, Equus is reviewing recent operational changes, identifying successful practices, and preparing for the upcoming program year with a continued focus on service delivery, participant outcomes, employer engagement, and program performance.

Youth Programs

Hospitality Cadre (Workforce Innovation and Opportunity Act funding)

The Hospitality Cadre cohort of 11 participants finished their in-house training at the end of May, gaining all the teamwork, communication and critical thinking skills and credentials (OSHA, NAEBL, AHLA – Guest Experience) to successfully enter hospitality-focused internships throughout Monterey County.

Green Cadre #3 (WIOA and CaliforniansForAll funding)

The third Green Cadre cohort of 23 participants finished their in-house training in May and have been working in small groups on either food insecurity or climate change.

Green Cadre #4 (CFA funding)

Recruitment for the fourth Green Cadre cohort began in late May. This cohort is scheduled to start the orientation and interview process in early July with work experience beginning in early August.

Tech Cadre – Joby Aviation (WIOA funding)

Of the 30 applicants eligible for Monterey County Works, approximately 16 were recommended to Joby for interviews as viable candidates. Joby staff selected one candidate to host as a Cadre intern for this round of the experience.

Tech-Social Media Cadre (WIOA funding)

Of the 12 participants who received in-house training:

- Two participants are awaiting direct placement in jobs – one with their internship site.
- Six participants are preparing to complete their internship hours and/or start working with their caseworkers for direct placement in June.
- Two participants elected to discontinue their program.
- One participant is being placed in an alternate internship site to finish her internship hours in July.
- One participant is currently completing a Social Media internship with Extended Health, gaining hands-on experience in content creation, social media engagement, online communication, brand promotion, website development, and customer engagement. This participant is also supporting the development of a business website by uploading menu items to provide customers with online ordering options.

Certified Nursing Assistant (WIOA-funded Occupational Skills Training)

Three young adult participants, two of them co-enrolled with Equus and Turning Point, completed their Certified Nursing Assistant (CNA) program with Central Coast College in late May and are now in the process of scheduling their state licensure examinations.

- One participant co-enrolled with Equus and Turning Point is on track to start CNA training with Central Coast College on June 15.
- Three participants are scheduled at the beginning of July to start their eligibility process for enrollment in the August 10 CNA cohort.

Updates on Executive Committee Members' Workforce and Business Activities

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