



SPECIAL WORKFORCE DEVELOPMENT BOARD MEETING AGENDA PACKET

Thursday, July 16, 2026
9:00 a.m. - 10:00 a.m.

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

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

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

NOTICE TO THE PUBLIC

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

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

The procedure for this meeting is as follows:

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



Monterey County
Special Workforce Development Board Meeting
Thursday, July 16, 2026
344 Salinas Street, Suites 205 & 206, Salinas, CA 93901

AGENDA

344 Salinas Street, Suite 101
Salinas, CA 93901

(831) 796-3331
www.montereycountywdb.org

WDB Members:

Erik Cushman,
WDB & Executive Chair

Cesar Lara,
WDB 2nd Vice Chair

Alma Diaz
Casey Van Den Heuvel
Cynthia Benitez
Efrain Aguilera
Josh Metz
Justin McIntire
Kimberly Schnader
Larry Hartman
Mark Faylor
Michael Gutierrez
Omar Perez-Sandoval
Paula Calvetti
Salvador Munoz
Supervisor Luis Alejo

CALL TO ORDER/ROLL CALL: CHANGES TO AGENDA: PUBLIC COMMENT: <i>(Limited to 2 minutes per person)</i>	Erik Cushman, Chair
DIRECTOR'S REPORT: <ul style="list-style-type: none"> Update on High RoadSM Construction Careers (HRCC) program. Update on new workforce legislation: Assembly Bill 1534. 	Chris Donnelly
CONSENT CALENDAR:	Erik Cushman
1. ACTION: Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) meeting of April 23, 2026.	Erik Cushman
2. ACTION: Concur with the Executive Committee's June 24, 2026, recommendation to 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.	Erik Cushman
3. ACTION: Concur with the Executive Committee's May 21, 2026, recommendation to approve staff to execute an agreement with the Laborers to provide HRCC training services using HRCC bridge funding in the amount of \$19,700 to support an additional 20-participant cycle of the Tri-County Pre-Apprenticeship program.	Erik Cushman
4. ACTION: Concur with the Executive Committee's May 21, 2026, recommendation to approve staff to execute a lease agreement with the Laborers for the use of their facility at 117 Pajaro St. in Salinas for the HRCC Pre-Apprenticeship program.	Erik Cushman
BUSINESS CALENDAR:	Erik Cushman
1. ACTION: Consider and approve the appointment of Eric Henry, 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 proposed, preliminary 2026-27 MCWDB budget.	Daisy Fernandez
3. ACTION: Concur with the Executive Committee's June 24, 2026, recommendation to 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 \$43,500 for the first month of PY 2026-27.	Chris Donnelly
4. ACTION: Concur with the Executive Committee's June 24, 2026, recommendation to 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 \$650,000 for the first six months of PY 2026-27.	Chris Donnelly
5. Updates on Board members' workforce and business activities.	Individual Board Members
ANNOUNCEMENTS:	Erik Cushman
SUBCOMMITTEE MEETINGS: Executive: 8/20/26	WDB MEETING: August 27, 2026



344 Salinas Street, Suite 101
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WDB Members:

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ADJOURNMENT

Erik Cushman

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UNADOPTED MINUTES

Monterey County Workforce Development Board Meeting

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

Thursday, April 23, 2026

Members Present: Erik Cushman (Chair) Cesar Lara, Alma Diaz, Omar Perez-Sandoval, Casey Van Den Heuvel, Josh Metz, Paula Calvetti, Mark Faylor, Kimberly Schnader, Efrain Aguilera, Salvador Munoz, and Supervisor Luis Alejo

Members Absent: Michael Gutierrez, Arpi Tanilian, Justin McIntire, Larry Hartman, and Roger Gilbert

Staff Present: Chris Donnelly, Elizabeth Kaylor, and Daisy Fernandez

Public Comment: None

Call to Order/Introductions: Erik Cushman called the meeting to order at 9:09 a.m. and asked for introductions. A quorum was established.

Changes to Agenda: None

Consent Calendar:

1. **ACTION:** Consider approval of minutes from the Monterey County Workforce Development Board (MCWDB) meeting of April 23, 2026.
2. **ACTION:** Concur with the Executive Committee's April 16, 2026, recommendation to approve its sole-source recommendation for Equus Workforce Solutions to provide 2026-27 Workforce Innovation and Opportunity Act (WIOA) One-Stop Operator services and forward the recommendation to the Board of Supervisors for consideration.
3. **ACTION:** Concur with the Executive Committee's April 16, 2026, recommendation approving staff to submit a request to the State Employment Development Department (EDD) to transfer \$900,000 of WIOA funding from Dislocated Worker to the Adult program.

A motion was made by Cesar Lara and seconded by Salvador Munoz to approve the first three items on the Consent Calendar. ALL AYES. Motion passed.

Consent Calendar items 4 through 6 were pulled for discussion:

4. **ACTION:** Concur with the Executive Committee's April 16, 2026, recommendation to approve the following revised policy: 2026-03 individual Training Accounts (ITA).
A motion was made by Cesar Lara and seconded by Efrain Aguilera to approve revised policy 2026-03. ALL AYES. Motion passed.
5. **ACTION:** Concur with the Executive Committee's April 16, 2026, recommendation to approve staff to execute a new, one-year website development, hosting, and maintenance agreement with Pat Davis Design Group in an amount not to exceed \$57,000 for the period from July 1, 2026, through June 30, 2027.
A motion was made by Paula Calvetti and seconded by Josh Metz to approve a one-year agreement for an amount not to exceed \$57,000 with Pat Davis Design Group for website development, hosting, and maintenance, for the period from July 1, 2026, through June 30, 2027. ALL AYES. Motion passed.
6. **ACTION:** Concur with the Executive Committee's April 16, 2026, recommendation to approve MCWDB's 2026-2028 Strategic Plan.
A motion was made by Cesar Lara and seconded by Paula Calvetti to approve MCWDB's 2026-2028 Strategic Plan. ALL AYES. Motion passed unanimously.

Discussion or Review of Business Calendar Action Items:

1. Business Calendar Item 2 was heard before Business Calendar Item 1. Finance Manager Daisy Fernandez provided an update on MCWDB's Fiscal Year 2025-26 3rd quarter budget and expenditures
2. Executive Director Chris Donnelly provided a presentation to the Board members on the State of California's Eligible Training Provider List.

3. Chair Erik Cushman led a discussion on the recruitment of a private sector Healthcare industry representative.
4. The Executive Director discussed the 2026 Local and Regional WIOA Contractor List Request for Qualifications (RFQ).
5. The Executive Director discussed the timeline for WIOA Youth and Adult/Dislocated Worker services Requests for Proposals (RFPs)
6. An update was provided by service providers on the WIOA Adult, Dislocated Worker, and Youth programs.
7. Board members provided updates on their workforce and business activities.

Adjournment: Mr. Cesar Lara adjourned the meeting at 11:00 a.m.



MEMORANDUM

TO: Workforce Development Board

FROM: Christopher Donnelly

SUBJECT: Approval to Extend Equus Adult and Dislocated Worker Agreement

DATE: July 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board concurs with the Executive Committee's June 24, 2026, approval to extend 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 MCWDB, staff will execute an amendment to the existing agreement with Equus.

MEMORANDUM

TO: Workforce Development Board

FROM: Christopher Donnelly

SUBJECT: Approval to Execute a High RoadSM Construction
Careers Agreement with the Laborers' Training
& Retraining Trust Fund for Northern California

DATE: July 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board concurs with the Executive Committee's May 21, 2026, approval for staff to execute an agreement with the Laborers' Training & Retraining Trust Fund for Northern California to provide one cycle of pre-apprenticeship training and placement services, effective June 1, 2026, through December 31, 2026, for an amount not to exceed \$19,700.

BACKGROUND:

The State of California's 2023 High RoadSM Construction Careers: Resilient Workforce Fund (HRCC: RWF) grants provide funding for pre-apprenticeship training services to prepare participants for careers in the building trades. In August 2023, the Monterey County Workforce Development Board (MCWDB) executed an agreement with the Monterey/Santa Cruz Counties Building Trades Council Training & Education Fund for a term from June 12, 2023, through March 31, 2026, to provide cohort-based pre-apprenticeship training services to a total of 126 participants. However, after one complete training cycle, the Building Trades Council notified the MCWDB that the agreement for HRCC: RWF services would be terminated effective February 15, 2024.

On June 25, 2024, the Monterey County Board of Supervisors authorized the MCWDB Executive Director to sign an agreement, effective June 25, 2024, through March 31, 2026, to continue the pre-apprenticeship training program with the Laborers' Training & Retraining Trust Fund for Northern California, as approved by the Monterey/Santa Cruz Counties Building & Construction Trades Council.

The MCWDB serves as the lead and fiscal agent for the Monterey Bay Collaborative's HRCC: RWF program, which primarily focuses on women but also seeks to serve disaffected youth, lower income and unhoused individuals, racial and ethnic minorities, and formerly incarcerated individuals. The program's outcomes included 87 participants to receive the industry-recognized Multi Craft Core Curriculum (MC3) certificate in preparation for their apprenticeships, thereby building the infrastructure workforce in the program's three-county region. During the grant term, MCWDB and the Laborers were able to graduate 93 participants with the MC3 certificate, thus exceeding the program goal of 87.

At the end of the grant term, MCWDB was notified that bridge funding in the amount of \$73,207 was available to extend the HRCC program for an additional cycle, that MCWDB's proposal for the additional cycle would be evaluated quickly, and that notice of award would be immediate for a start date of June 10, 2026.

DISCUSSION:

MCWDB provided its grant proposal by the May 6 due date and received notice on the following day, May 7, 2026, that it would be awarded a total of \$73,207 to continue the HRCC program, with \$19,700 to be allocated to the Laborers' Training & Retraining Trust Fund for Northern California to provide the pre-apprenticeship training (\$17,500), as well as testing and instructional materials for the program (\$2,200).

NEXT STEPS:

If the recommendation to execute an agreement with the Laborers' Training & Retraining Trust Fund is approved by the MCWDB, it will be developed and forwarded to the Monterey County Board of Supervisors for approval at the next available meeting date.



MEMORANDUM

TO: Workforce Development Board

FROM: Christopher Donnelly

SUBJECT: Approval of a Lease Agreement with Laborers' Local 270 for Use of the Main Hall and 2 Additional Rooms at its Salinas Facility

DATE: July 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board (MCWDB) concurs with the Executive Committee's May 21, 2026, approval of a lease agreement with Laborers' Local 270 for use of the main hall and two additional rooms at their Salinas Hall facility at 117 Pajaro St., for an amount not to exceed \$2,000 per month, for a total annual amount of \$24,000 per year, to commence on July 1, 2026.

BACKGROUND/DISCUSSION:

Pre-apprenticeship training program classes have been held at the Plumbers & Steamfitters Local 62 training facility in Castroville for the last five years. For the most recent program funded by the State of California's High RoadSM Construction Careers Resilient Workforce Fund (HRCC: RWF), the rent for the facility was \$1,000/month, for an annual amount of \$12,000/year.

Based on providing an application to the State for Round One of a new pre-apprenticeship training grant, MCWDB's Executive Director has entered into discussions with the Plumbers on the cost of rent for the Castroville facility, which was recently raised to \$5,000/month, for an annual amount of \$60,000.

MCWDB has an opportunity to transition its pre-apprenticeship training operations to the Laborers' Hall in Salinas for a much lower cost of \$2,000/month, for an annual amount of \$24,000, and has received a lease agreement from the Laborers to move forward with this transaction. The two-page, month-to-month lease agreement is attached.

NEXT STEPS:

If the MCWDB approves a lease agreement with the Laborers, staff will coordinate with County Counsel, Real Estate, and Contracts/Purchasing to provide the lease agreement to the Board of Supervisors for final approval.

LOCAL 270 MONTH-TO-MONTH LEASE AGREEMENT

Date: May 5, 2026

This Month-to-Month Lease Agreement (“Agreement”) is entered into on May ____, 2026, by and between Laborers’ Local 270 (“Lessor”) and Monterey County Workforce Development Board (“Lessee”).

1. Premises

Lessor hereby leases to Lessee the following portions of the property located at:

Salinas Hall
117 Pájaro St.
Salinas, CA 93901

The leased space includes:

- * The main hall, and
- * Two (2) additional rooms

2. Term

The lease shall begin May _____, 2026 and shall continue on a month-to-month basis unless terminated by either party with 30 days written notice.

3. Rent

Lessee agrees to pay Lessor Two Thousand Dollars (\$2,000.00) per month, due on the 1st day of each month.

Payment shall be made to:

Laborers’ Local 270
2195 Fortune Drive
San Jose, CA 95131
(408) 297-2620

4. Purpose of Use

Lessee shall use the premises for workforce development operations, meetings, trainings, or related functions conducted by the Monterey County Workforce Development Board.

5. Condition of Premises

Lessee accepts the premises as-is and agrees to maintain them in clean and orderly condition. Any damage beyond normal wear and tear shall be repaired at Lessee’s expense.

6. Insurance and Liability

Lessee agrees to maintain appropriate liability insurance for activities held within the leased premises and will hold Lessor harmless for any injuries, claims, or liability arising from Lessee's use, except for those caused by Lessor's negligence.

7. Utilities and Access

Lessor shall provide reasonable access to utilities already functioning within the building.

8. Point of Contact

For Lessor (Laborers' Local 270):

Luis Arguello
2195 Fortune Drive
San Jose, CA 95131
(408) 297-2620

For Lessee (Monterey County Workforce Development Board):

Christopher Donnelly, Executive Director
344 Salinas Street, Suite 101
Salinas, CA 93901
(831) 759-6644

9. Entire Agreement

This Agreement constitutes the full understanding between the parties and may only be modified in writing, signed by both parties.

SIGNATURES

Lessor:
Laborers' Local 270

Luis Enrique Arguello
Title: Assistant Business Manager, Laborers' Local 270

Signature: *Luis Arguello* Date: 5/5/2026

Lessee:
Monterey County Workforce Development Board

Christopher Donnelly
Executive Director
Signature: _____ Date: _____



WORKFORCE DEVELOPMENT
BOARD: 7/16/2026
AGENDA ITEM: 1

MEMORANDUM

TO: Workforce Development Board

FROM: Christopher Donnelly

SUBJECT: Approval of Appointment of Eric Henry,
Representing Business

DATE: July 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board (MCWDB) approves the appointment of Eric Henry, representing Business, to the Monterey County Workforce Development Board.

BACKGROUND:

Mr. Henry, Senior Vice President and Area Manager, Kaiser Permanente, has applied for membership to the full Workforce Development Board.

ATTACHMENTS:

Mr. Henry's application

MONTEREY COUNTY WORKFORCE DEVELOPMENT BOARD APPLICATION FOR MEMBERSHIP

CONTACT INFORMATION

Name:

Eric Henry

Title:

Senior Vice President & Area Manager

Phone:

Mobile Phone:

Email:

City of Residence:

Morgan Hill

BUSINESS INFORMATION

Business Name:

Kaiser Permanente

Business Address:

1930 N Davis Road
Salinas, CA 93907
[Map It](#)

Business Website:

<https://healthy.kaiserpermanente.org/northern-california/facilities/salinas-medical-offices-468468>

Number of Current Employees:

218

Number of Years with Current Business:

3

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

18 months

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

Kaiser Permanente exists to provide high-quality, affordable health care services and to improve the health of our members and the communities we serve.

Founded in 1945, Kaiser Permanente is recognized as one of America's leading health care providers and nonprofit health plans. We currently serve members in 9 states and the District of Columbia.

Our care model enables our teams to think and work as one, coordinating your care seamlessly, so you don't have to — and delivering better care when it matters most. Our members have access to care from Kaiser Permanente health care professionals by phone or video 24/7.

Care for members and patients focuses on their total health. Permanente Medical Group physicians, specialists, and teams of caregivers guide all care. Our medical teams are enabled by industry-leading technology and tools for health promotion, disease prevention, care delivery, and chronic disease management.

We entered Monterey County on January 2, 2025 and operate from our Salinas Medical Office Building.

My roles as the senior vice president has oversight over our entire operations in Monterey County in addition to Santa Clara and Santa Cruz counties.

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

Silicon Valley Leadership Group, Board Member - 2 years
Fellow , American College of Healthcare Executives - 10+ years
Santa Clara County Hospital CEO Council - 3 years

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

Power 100 Recognition, Silicon Valley 2025

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

Ensures high levels of customer satisfaction and member retention by investing in, structuring, and directing operations to meet customer needs and by reinforcing a culture of excellence in customer service
Ensures the integration of quality, service and efficiency improvements into day-to-day operations
Ensures the delivery of high quality, integrated patient care and the effective use of resources by building strong, performance-based relationships with SCPMG and Labor
Maintains a fiscally sound enterprise that generates financial returns at targeted levels through effective business practices and sound financial arrangements
Enhances Kaiser Permanente-s social contribution by effectively guiding direct and indirect community benefit investments and by building a strong community presence to meet health care needs of the members
Assures effective execution of business strategies by aligning human resource strategies with business needs, by recruiting and developing a high-performance leadership team, and by developing a climate which builds employee commitment and reinforces high performance and customer service, and supports diversity
Supports the success of the enterprise by effectively contributing to and utilizing national strategies and capabilities, actively sharing new learning and innovation, and by assuring business practices are consistent with Kaiser Permanente-s Business Fundamentals
Ensures the successful implementation of, promotes and operationalizes the Labor-Management Partnership throughout the organization. Achieves key LMP initiatives and ensures the demonstration of LMP behaviors throughout the organization. Ensures Labor participation in appropriate decision making forums and committees

Monterey County Workforce Development Board

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

I hope to become an advocate for the workforce development needs for the county by bringing healthcare and other employer perspective as a part of the board. In addition, I can ensure there is consistent alignment with our own internal community engagement activities in supporting the community and its residents.

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?

Budget Analysis over 25 years
Fundraising - 15 years
Workforce Policy Development - 10 years
Knowledge of Labor Market - employer perspective over 25 years

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 hope to become an advocate for the workforce development needs for the county by bringing healthcare and other employer perspective as a part of the board. In addition, I can ensure there is consistent alignment with our own internal community engagement activities in supporting the community and its residents. I can be value added to help prepare residents for the next wave of workforce retooling.

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

06/16/2026



WORKFORCE DEVELOPMENT
BOARD: 7/16/26
AGENDA ITEM: 2

MEMORANDUM

TO: Monterey County Workforce Development Board

DATE: July 16, 2026

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

FROM: Daisy Fernandez, Finance Manager

Signed by:

APPROVED BY: Christopher Donnelly

Chris Donnelly

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RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board (MCWDB) 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	\$ 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

FROM: Christopher Donnelly

SUBJECT: Approval to Extend Turning Point Youth Agreement

DATE: July 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board concurs with the Executive Committee's June 24, 2026, approval to extend 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 \$43,500 to continue to serve youth in the southern portion of Monterey County, for an agreement term of July 1, 2026, through July 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:

On June 18, 2026, Turning Point of Central California provided a formal notification to the MCWDB regarding its decision not to renew the existing agreement to provide WIOA- and CaliforniansForAll-

funded services upon the June 30, 2026, expiration of its Youth services agreement with the MCWDB. The Executive Committee recommends approval of a one-month amendment to the Youth services agreement with Turning Point in the amount of \$43,500, to continue case management and workforce development services to youth participants in South Monterey County and close out operations from July 1, 2026, through July 31, 2026.

NEXT STEPS:

The MCWDB expects to release a Request for Proposals (RFP) for Youth services in early August. It is anticipated that the results of the 2026 Youth Services RFP process will be announced in October 2026.



MEMORANDUM

TO: Workforce Development Board

FROM: Christopher Donnelly

SUBJECT: Approval to Extend Equus Youth Agreement

DATE: July 16, 2026

RECOMMENDATION:

It is recommended that the Monterey County Workforce Development Board concurs with the Executive Committee's June 24, 2026, approval to extend 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 \$650,000 to serve 88 newly enrolled youth in 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.

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 (CFA) 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:

On June 18, 2026, MCWDB's other Youth services provider, Turning Point of Central California, Inc., notified MCWDB that it would not be renewing its agreement for 2026-27, but would instead provide an additional month of services from July 1, 2026, through July 31, 2026, to ensure program continuity

during close-out. During this transitional month, Equus will continue to provide services to youth in North Monterey County until it begins providing county-wide services on August 1, 2026. Equus will also serve approximately 50 Turning Point participants carried in from 2025-26. The Executive Committee recommends approval of a six-month amendment to the Youth services agreement with Equus in the amount of \$650,000, to support the provision of case management and workforce development services to 88 new youth participants – 40 Mainstream and 48 CFA-funded Green Cadre – in Monterey County.

A key focus of the agreement 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.

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, MCWDB expects to release a Request for Proposals (RFP) for Youth services in 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 MCWDB, staff will execute an amendment to the existing agreement with Equus.

Updates on Board Members' Workforce and Business Activities

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