

**MEMBERS:**

**Carl Dudley, Chair**  
Pacific Western Bank

**Louise Matheny, Vice Chair**  
Morris & Garritano

**Dr. James J. Brescia**  
SLO County Office of  
Education

**Colleen Bunch**  
Revasum

**Loreli Cappel**  
Economic Vitality  
Corporation

**Josh Cross**  
Paso Robles Chamber of  
Commerce

**Isiah Gomer**  
Paso Robles Waste &  
Recycle

**William Hills**  
United Staffing  
Associates, LLC

**Tony Ray Hoffman**  
Tri-Counties Central Labor  
Council

**Suzanne Hosn**  
Pacific Gas & Electric Co.

**Verena Latona-Tahman**  
Cannon Corporation

**Patrick McGuire**  
Mid-State Precision, Inc.

**Justin McIntire**  
Department of  
Rehabilitation

**Mary Navarro-Aldana**  
Employment Development  
Department

**William Ray**  
Operating Engineers  
Training Trust

**Mark Simonin**  
Local IBEW 639

**Charlissa Skinner**  
Lucia Mar Adult Education

**Dr. Jill Stearns**  
Cuesta College

**Jennifer Stubbs**  
Sports Warehouse

**Courtney Taylor**  
Law Office of  
Courtney E. Taylor

*VISION: The Workforce needs of employers and job seekers in San Luis Obispo County are met.*

## WORKFORCE DEVELOPMENT BOARD MEETING AGENDA

**Date:** Thursday, August 1, 2019

**Time:** 8:00 AM – 10:00 AM

**Location:** Department of Social Services, 3433 S. Higuera Street, San Luis Obispo, Room 101

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- 1. Call to Order and Introductions** *Dudley*
  - 2. Public Comment**
  - 3. Consent Items:** *Dudley*
    - 3.1 Approve the May 2, 2019 Minutes
    - 3.2 Approve the Appointment of Kirk Coviello to the Business Council Committee *Boulanger*
  - 4. Action Items:**
    - 4.1 Nomination and Election of Officers *Dudley/  
Boulanger  
Boulanger*
    - 4.2 Review and Approve PY 19-20 Local Area Budget for Workforce Services in the amount of \$2,199,687
  - 5. Information/Discussion Items:**
    - 5.1 Receive and discuss Eckerd WIOA AJCC Services contract fourth quarter performance report *Hayter*
    - 5.2 Receive and discuss Eckerd WIOA Youth Services contract fourth quarter performance report *Hayter*
    - 5.3 Receive report on PY 18-19 Local and State Program Monitoring *Hayter*
  - 6. Reports:**
    - 6.1
      - a) Executive Committee Report *Dudley*
      - b) Business Council Report *Gomer*
      - c) Services & Strategies Committee Report *McIntire*
      - d) Staff Report *Boulanger*
  - 7. Board Member Workforce Development Updates**
  - 8. Next Meeting:**

November 7, 2019 at 8:00 a.m.  
Department of Social Services, 3433 S. Higuera Street, SLO, Room 101
  - 9. Adjournment**

**WORKFORCE DEVELOPMENT BOARD  
of San Luis Obispo County**

**WORKFORCE DEVELOPMENT BOARD MEETING MINUTES**

**Date:** Thursday, May 2, 2019  
**Time:** 8:00 a.m.  
**Location:** 3433 S. Higuera Street, San Luis Obispo, Room 101

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**Present:** Carl Dudley, Loreli Cappel, Josh Cross, Isiah Gomer, William Hills, Tony Hoffman, Suzanne Hosn, Patrick McGuire, William Ray, Mark Simonin, Charlissa Skinner, Colleen Bunch, Jennifer Stubs  
**Absent:** James Brescia, Louise Matheny, Verena Latona-Tahlman, Mary Navarro-Aldana, Jill Stearns, Justin McIntire, Courtney Taylor,  
**Guests:** Jennifer Huss, Allison Schiavo, Jenna Morton, Tammy Aguilera  
**Staff:** Dawn Boulanger, Sarah Hayter, Michael Coughlin, Diana Marin, Ben Dore (County Counsel), Jenna Morton (County Counsel)

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**1. Call to Order and Introductions:**

**Chairperson Carl Dudley** called the meeting to order at 8:02 a.m. **Quorum reached.**

**2. Public Comment:**

**Chair Dudley:** opened the floor to public comment without response.

**3. Consent Items:**

**3.1** Approve February 7, 2019 Minutes

The Board approves consent item 3.1

Motion: William Hills

Second: Tony Hoffman

Abstentions: None

**Motion Passed Unanimously**

**4. Action Items:**

**4.1 Approve the Local Area Subsequent Designation and Local Board Recertification Request**

Dawn Boulanger (Staff) presented the item which is available as part of the agenda.

**Chair Dudley:** opened the floor to public comment without response.

The Board approves the Local Area Subsequent Designation and Local Board Recertification Request.

Motion: Isiah Gomer

Second: Jennifer Stubs

Abstentions: None

**Motion Passed Unanimously**

**4.2 Review and Approve draft scope of work and draft budget for PY 19-20 WIOA America's Job Center of California (AJCC) Services Contract with Eckerd Youth Alternatives, Inc.**

Sarah Hayter (Staff) presented the report to the Board which is available as part of the agenda.

**Chair Dudley:** opened the floor to public comment without response.

The Board approves the draft scope of work and draft budget for PY 19-20 WIOA AJCC Services Contract with Eckerd Youth Alternatives, Inc.

Motion: Loreli Cappel

Second: Jennifer Stubs

Abstentions: None

**Motion Passed Unanimously**

## **5. Information/Discussion Items:**

### **5.1 Receive and discuss Eckerd WIOA AJCC Services contract third quarter performance report**

Sarah Hayter (Staff) presented the report to the Board which is available as part of the agenda.

**Chair Dudley:** opened the floor to public comment without response.

### **5.2 Receive and discuss Eckerd WIOA Youth Services contract third quarter performance report**

Sarah Hayter (Staff) presented the report to the Board which is available as part of the agenda.

**Chair Dudley:** opened the floor to public comment without response.

### **5.3 Discuss WDB Grant Application Processes**

Dawn Boulanger (Staff) presented the availability of grant opportunities to bring additional funding to the SLO County WDB. Requested thoughts on WDB Admin staff applying for additional funding opportunities. The board supported suggestion.

**Chair Dudley:** opened the floor to public comment without response.

## **6. Reports:**

- **6.1 a) Executive Committee (EC) Report:** Chairperson Dudley stated that the EC met on March 13, 2019 and April 24, 2019. On March 13, 2019 the EC reviewed Eckerd's AJCC contract and performance. Appointed Allison to Services & Strategies Committee. Directed and authorized Admin entity to commence contract negotiations concerning the AJCC with Eckerd for PY 2019-2020. Approved both WIOA Local and regional plan modifications for PY 2017-2020. On April 24, 2019 Appointed Alan McKean and Kevin Reeder to the Services and Strategies Committee. Approved the AJCC Hallmarks of Excellence. Approved the Draft Scope of Work/Budget for PY 2019-2020 WIOA Youth Services Contract with Eckerd Youth Alternatives, Inc. Approved the Local Policy on Transitional Jobs
- b) Business Council (BC):** EC Chairperson Isiah Gomer stated that the BC discussed LMI on Transportation Occupations at February 9<sup>th</sup> meeting. BC did not meet in April.
- c) Services & Strategies Committee (SSC):** Michael Coughlin (Staff) noted that the SSC has not met since last WDB meeting. Success pilot of participant surveys through CAPSLO with over 50 responses. The committee is hoping to fill the Chair position and roll out the survey to multiple agencies by next meeting that is to be held July 9<sup>th</sup>.
- c) Staff Report:** Dawn Boulanger (Staff) mentioned that the work being conducted because of the discussion at Business Council is a great example of the system functioning as a system. Staff is currently working with community partners to address needs for local employer ACI Jet. The results of program monitoring conducted by the state in November were received with no findings. State Fiscal Monitoring is coming up at the end of the year. Sarah Hayter (staff) just completed program monitoring and will be reporting out to the Executive Committee. State ADA and EEO monitoring resulted in 1 finding and staff is currently working with Eckerd on Corrective Action Plan of how data is stored. Executive committee approved the Transitional Jobs policy.

## **6.2 Receive and Review Fiscal Agent's Budget Update**

Dawn Boulanger (Staff) outlined the budget which is available as part of the agenda.

## **7. Board Member Updates:**

**Chair Dudley:** opened the floor to updates from the Board membership.

**Carl Dudley, Loreli Cappel, Josh Cross, Tony Hoffman, Suzanne Hosn, Patrick McGuire, William Ray, Mark Simonin, Jennifer Stubs, Charlissa Skinner, Colleen Bunch:** speak.

## **8. Next Meeting:**

August 1, 2019

8:00 – 10:00 AM

Department of Social Services 3433 South Higuera, Room 101, 1<sup>st</sup> Floor, San Luis Obispo, CA

## **9. Adjournment:**

**Chair Dudley:** adjourned the meeting at 9:39 A.M.

I, Diana Marin, Clerk of the Workforce Development Board of San Luis Obispo, do hereby certify that the forgoing is a fair statement of the proceedings of the meeting Thursday, May 2, 2019 by the Workforce Development Board of San Luis Obispo County.

Diana Marin, WDB Program Specialist

Dated: May 29, 2019

**Workforce Development Board  
Consent Item  
August 1, 2019**

**AGENDA ITEM NUMBER: 3.2**

**ITEM: Approve the Appointment of Kirk Coviello to the Business Council**

**ACTION REQUIRED:**

It is requested that the Workforce Development Board approve the appointment of Kirk Coviello to the Business Council.

**SUMMARY NARRATIVE:**

On October 18, 2016, the San Luis Obispo County Board of Supervisors passed a resolution formally approving the revised Bylaws of the Workforce Development Board of San Luis Obispo County (WDB). The WDB Bylaws require the formation of a Business Council with the expressed purpose of making recommendations for the Business Service Plan to the WDB to increase employer and industry involvement in the activities of the WDB and integrate local business involvement with workforce initiatives and industry sector strategies.

Membership on the Business Council shall include business representatives from the Board of Directors who represent both the leading industries and employers in the regional economy and emerging sectors that have significant potential to contribute to job growth in the local area.

**Kirk Coviello** is the IT Project Manager with TransUnion. He has served as Vice-chair for the Workforce Development Board here in San Luis Obispo County. Mr. Coviello will provide insight into workforce needs in the Knowledge and Innovation industry. He hopes to make a positive difference through data evaluation, analysis, and recommended actions based on data.

**BUDGET/FINANCIAL IMPACT:**

No current fiscal impact

**STAFF COMMENTS:**

Dawn Boulanger, Director of San Luis Obispo County Workforce Development, recommends the appointment of Kirk Coviello to the Business Council.

## Business Council Member Application Form

### Applicant Information:

Name: \_\_\_\_\_ Job Title: \_\_\_\_\_

Address: \_\_\_\_\_ County: \_\_\_\_\_

Telephone: (Office) \_\_\_\_\_ (Cell): \_\_\_\_\_

Fax #: \_\_\_\_\_ Email: \_\_\_\_\_

Company/Organization: \_\_\_\_\_ No. of Employees: \_\_\_\_\_

Company Website: \_\_\_\_\_

Assistant/Secretary Name: \_\_\_\_\_

Assistant/Secretary Email: \_\_\_\_\_

Assistant Telephone: (Office) \_\_\_\_\_ Fax#: \_\_\_\_\_

Industry Cluster Represented: \_\_\_\_\_

1. Building Design & Construction
2. Energy
3. Knowledge & Innovation (information, communication & technology, professional & technical services, education & training)
4. Specialized Manufacturing
5. Health Services
6. Uniquely SLO (Agriculture/Food, Tourism, Wine)

Experience with local business, workforce development, economic development, human resources, or education:

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Does your organization participate in an industry cluster initiative? \_\_\_\_\_

If not, why? \_\_\_\_\_

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List any affiliations and offices held with other associations/organizations/committees presently serving on:

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What do you think are the critical workforce issues in our County?

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What will you bring to the Business Council?

(i.e., network, resources, experience, insight into workforce needs in your industry, etc.)

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What are your goals for participation on the Business Council?

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I formally request that consideration be given to my nomination for appointment to the Business Council of the San Luis Obispo County Workforce Development Board.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

**Workforce Development Board  
Action Item  
August 1, 2019**

**AGENDA ITEM NO: 4.1**

**SUBJECT: Nomination and Election of Officers (Chair and Vice-Chair)**

**ACTION REQUIRED:** Call for Nominations and Election of Workforce Development Board (WDB) Officers

**SUMMARY NARRATIVE:**

The presiding officers of the WDB, a Chairperson and Vice-Chairperson, have two year terms of office beginning July 1<sup>st</sup> and ending on June 30<sup>th</sup>, two years later. WDB bylaws require the election of officers to be in accordance with Robert's Rules of Order and the Workforce Innovation and Opportunity Act (WIOA) requires that Officers be business seat representatives.

**Method for Nominating Candidates:**

Nominations are made from the floor and any member may call out to nominate someone and may do so without being recognized by the Chair. Seconds are not necessary. The Chair then announces that the person is nominated. When it appears that everyone who wishes to has made a nomination, the Chair will close the nominations. It is not necessary to make a motion to close the nominations. Nomination for Chair is done separately from Vice-Chair.

**Voting:**

Voting will be done by ballot, when multiple nominations are made, or by "acclamation", when only one candidate has been nominated. It is not necessary for persons nominated to abstain from voting. If no candidate receives a majority, balloting continues, retaining on the ballot all candidates who do not voluntarily withdraw. The election is final when the Chair announces the result and if the candidate is present and does not decline or is absent but has previously consented to serve.



**Workforce Development Board**  
**ACTION ITEM**  
**August 1, 2019**

**AGENDA ITEM NUMBER: 4.2**

**ITEM: Review and Approve PY 19-20 Local Area Budget for Workforce Services in the amount of \$2,199,687**

**ACTION REQUIRED:** Review and Approve proposed PY19-20 WIOA Formula funds local area budget.

**SUMMARY NARRATIVE:**

The State Employment Development Department released the revised WIOA formula allocations for Adult, Dislocated Worker, and Youth funding streams on May 24, 2019, and the Rapid Response and Layoff Aversion allocations on July 20, 2019. San Luis Obispo County estimates receiving \$1,432,285 for PY 18-19 (an approximately 10% reduction from PY 18-19) and includes the following:

- \$389,757 in Adult funds
- \$409,843 in Dislocated Worker funds
- \$504,333 in Youth funds
- \$102,479 in Rapid Response funds
- \$25,873 in Rapid Response Layoff Aversion funds

Based on an estimate of unexpended funds from 2018-2019, the Administrative Entity is projecting \$767,402 in carry over funds.

Funding Source	Anticipated Carryover
Adult	\$ 125,439
Dislocated Worker	\$ 285,035
Youth	\$ 329,513
Rapid Response	\$ 0
Rapid Response Layoff Aversion	\$ 27,415
Total C/O anticipated available	\$ 767,402

The local area's proposed budget is attached (Attachment 4.2) for the WDB's review and approval. The budget incorporates projected unexpended funds from 2018-2019 and the new allocation into a single year budget and allows for approximately 19% planned carryover of funds from 2019-2020 to 2020-2021. Local areas may carry-over up to 20% of their allocation, based on a two-year cycle for funds. Revisions may be made upon finalization of any carryover funds. A summary of the funds available and projected obligations are as follows:

PY 2019-2020 allocation	\$ 1,432,285
Projected 18-19 carryover	\$ 767,402
<b>Total projected funding</b>	<b>\$ 2,199,687</b>
Planned Obligations	\$ 1,951,986
C/O to PY 2020-2021	\$ 247,701

Per the proposed plan, funds will be directed towards the following uses:

- \$917,000 AJCC Operator Contract for Adult, Dislocated Worker and Rapid Response services. See Attachment 4.2 tab 4.
- \$500,000 WIOA Youth Services contract. See Attachment 4.2, tab 4.
- \$483,886 for WDB, Administrative Entity, and Fiscal Agent staff costs. See Attachment 4.2, tab 2.
- \$20,800 for operating and programmatic costs. See Attachment 4.2, tab 3.
- \$23,000 in services and systems purchase orders See Attachment 4.2, tab 5.
- \$7,300 in WDB Set-Aside budget. See attachment 4.2, tab 6.

**BUDGET OR FINANCIAL IMPACT:**

The PY 19-20 funds will be added to the County's budget as part of the WIOA PY19-20 subgrant approval process.

7/25/2019

# WIOA Formula Plan FY 19-20

	Formula Allocations			Information only Training Dedication		alloc % (A/D/Y)	active participants % est	Final Carryover	TOTAL FORMULA FUNDING
	Round 1	Round 2	Total	(Possible Leverage ) 20%	10%				
Adult	61,713	328,044	389,757	77,951	38,976	29.9%	3.7%	125,439	515,196
DLW	71,386	338,457	409,843	81,969	40,984	31.4%	55.0%	285,035	694,878
Youth		504,333	504,333			38.7%	41.3%	329,513	833,846
RR*	17,850	84,629	102,479					0	102,479
RR/LA*	4,507	21,366	25,873					27,415	53,288
	-	-	0					0	0
<b>Total</b>			<b>1,432,285</b>	159,920	79,960	100.0%	100.0%	<b>767,402</b>	<b>2,199,687</b>

WIB & AE (DSS) Staff Salaries	DSS Operating	AJCC One- Stop Operator Contract	Youth Services Contract	Service & Systems P.O.s	WIB Set- Aside	Total Planned Obligations	Est Available Balance
483,886	20,800	917,000	500,000	23,000	7,300	1,951,986	247,701
15,840	4,000	490,200	0	3,500	1,600	515,140	56
235,466	8,200	326,800	0	10,000	2,600	583,066	111,812
176,813	8,600	0	500,000	9,500	3,100	698,013	135,833
22,479	0	80,000	0	0	0	102,479	0
33,288	0	20,000	0	0	0	53,288	0
				0	0	0	0
<b>483,886</b>	<b>20,800</b>	<b>917,000</b>	<b>500,000</b>	<b>23,000</b>	<b>7,300</b>	<b>1,951,986</b>	<b>247,701</b>

0

1,303,933 260,787  
 \*Projected c/o allowable

**239,880** Total Training Requirement

## DSS WIOA Staff Salary & Benefits Cost

DSS Staff	WIOA % of time
<b>Dawn Boulanger</b> <i>Admin Services Manager</i>	100%
<b>Sarah Hayter</b> <i>Program Manager</i>	100%
<b>Diana Marin</b> WIOA Program Review Specialist	100%
<b>Leann Ross</b> WIOA Program Review Specialist	100%
<b>Sondra Stambolian</b> <i>Fiscal Manager (10% FTE)</i>	10%
<b>TOTAL DSS STAFF SALARIES &amp; BENEFITS:</b>	<b>\$ 483,886</b>

**DSS Operating Expenditure Budget**  
Fiscal Year 2019-2020

	<b>FY18/19 Budget</b>	<b>Funding Source for budget</b>	<b>Adult</b>	<b>DLW</b>	<b>Youth</b>	<b>RR</b>	<b>RR/LA</b>	
Travel - (AE staff only)	8,000	A/DW/Y/RR	1,000	3,000	4,000			\$ 8,000
Registrations for conferences, workshops, seminars (AE Staff only)	1,800	A/DW/Y/RR		900	900			\$ 1,800
Auditing (County Auditor)	9,000	A/DW/Y	3,000	3,000	3,000			\$ 9,000
Office Supplies	500	A/DW/Y		300	200			\$ 500
Publication and Legal Notices	1,500	A/DW		1,000	500			\$ 1,500
<b>Total:</b>	<b>20,800</b>		\$ 4,000	\$ 8,200	\$ 8,600	\$ -	\$ -	\$ 20,800

Travel: All costs for Admin entity (other than  
the Registrations for conferences, workshops  
or seminars)

## WIOA Contracts

Fiscal Year 2019-2020

Vendor	Description	FY18/19 Budget	Funding Source for budget	Adult	DLW	Youth	RR	RR L/A	
AJCC	AJCC One-Stop System Operation	817,000	A/DW	490,200	326,800				\$ 817,000
Youth Services Contract	Out-of-School Youth Services	500,000	Youth			500,000			\$ 500,000
Rapid Response		100,000	RR/LA				80,000	20,000	100,000
<b>Total Contracts:</b>		<b>\$ 1,417,000</b>		\$ 490,200	\$ 326,800	\$ 500,000	\$ 80,000	\$ 20,000	\$ 1,417,000

## WIOA Services & Systems Purchase Orders

Fiscal Year 2019-2020

Vendor	Description	FY18/19 Budget	Funding Source for budget	Adult	DLW	Youth	RR	RR/LA	CalJobs	
Chmura (Dues and Subscrip).	Labor Market Subscrip.	8,000	A/DW	1,000	4,000	3,000				\$ 8,000
Racy Ming & Associates	Local Policies	15,000	A/DW/Y	2,500	6,000	6,500				\$ 15,000
		-	A/DW							
		-	A/DW/Y							
		-	A/DW							\$ -
<b>Total Services &amp; Systems P.O.s:</b>		<b>\$ 23,000</b>		\$ 3,500	\$ 10,000	\$ 9,500	\$ -	\$ -	\$ -	\$ 23,000

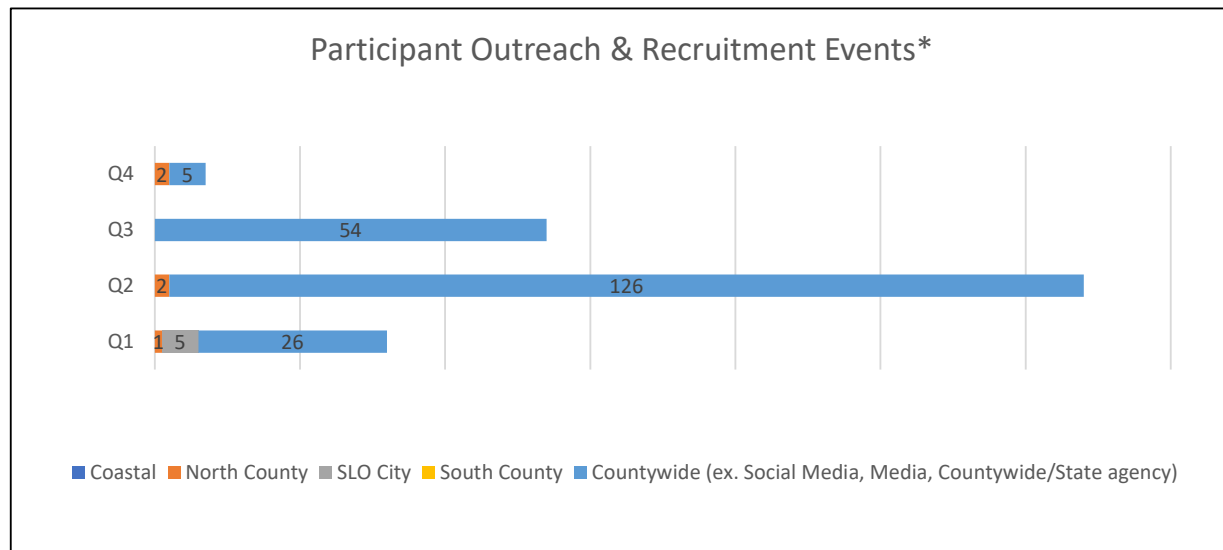
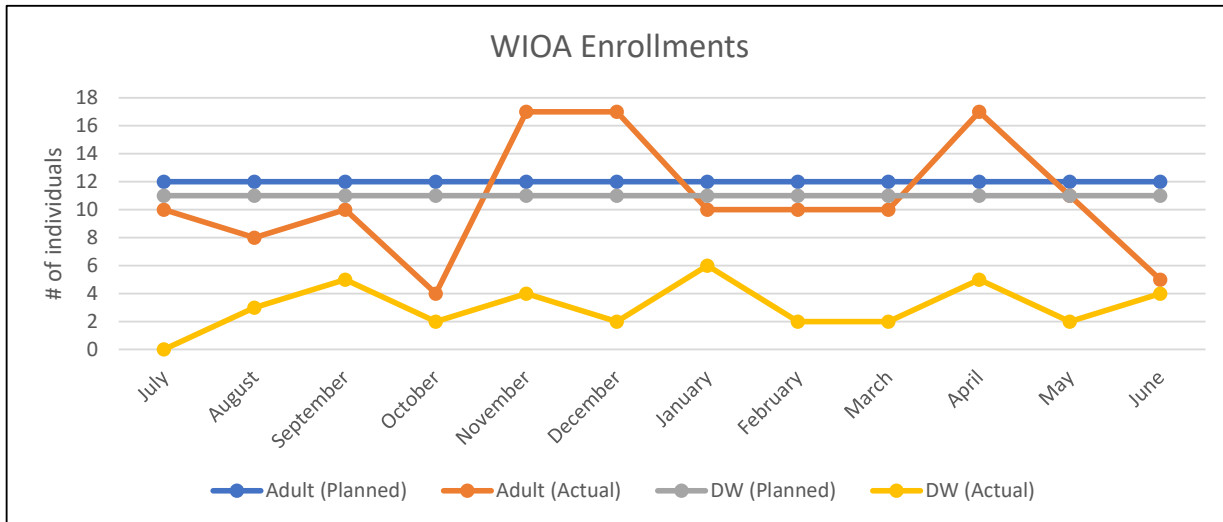
## WIOA WDB Set-Aside

0

Description	FY18/19 Budget	Funding Source for budget	Adult	DLW	Youth	
CWA (Youth/Spring/Fall) Conference (WDB Board Members)	2,000	A/DW/Y	500	500	1,000	\$ 2,000
Membership Renewals/Sponsorships (Chambers/HR/CWA/NAWB)	5,000	A/DW	1,000	2,000	2,000	\$ 5,000
Recognition	300	A/DW/Y	100	100	100	\$ 300
<b>Total WDB Set-Aside Budget:</b>	<b>\$ 7,300</b>		\$ 1,600	\$ 2,600	\$ 3,100	\$ 7,300

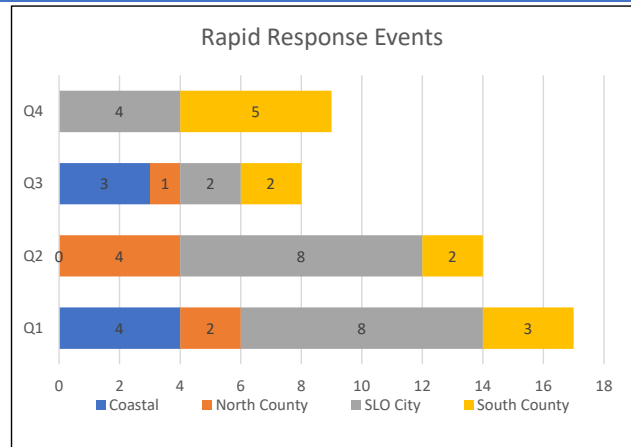
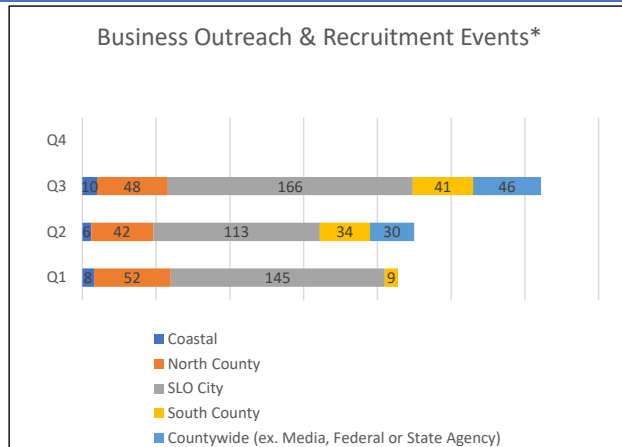


**WIOA AJCC Services  
Career Services  
Program Year 2018-2019: Quarter 4**



\*For Quarter 4, the 5 count in North County includes media print/digital publications with Access Publishing. The 5 count under Countywide includes Facebook posts and 4 Partner Collaborations.

**WIOA AJCC Services  
Business Services  
Program Year 2018-2019: Quarter 4**



\*Quarter 4 data for *Business Outreach and Recruitment Events* was not able to be sorted by region and/or total count.

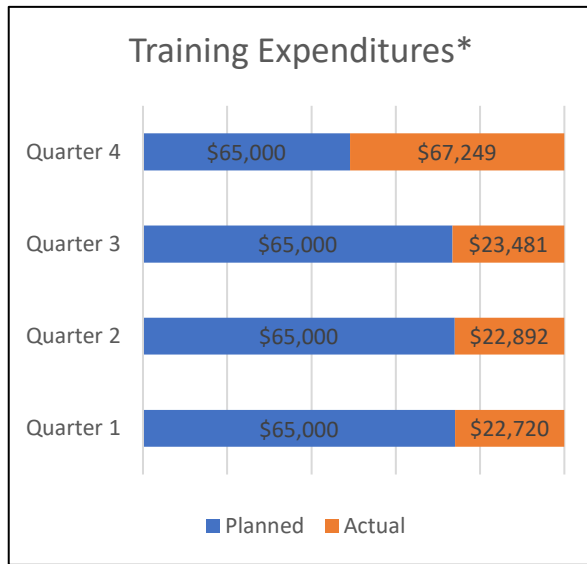
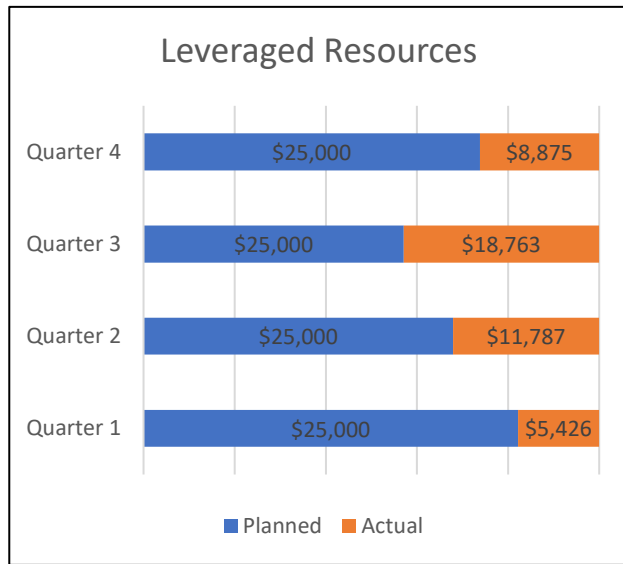
**Fourth Quarter On-The-Job (OJT) Training Contracts**

Employer	Occupation	Hourly Rate
Rantec	Electronic Assembler	\$15.25
Pismo Village Resort	Maintenance Worker	\$14.00
EDR	QA Automation Engineer	\$25.00
Miners	Store Assistant Manager	\$20.00
ESChat	Software Tester	\$15.00
SPOKES	Data Processor/Office Administrator	\$18.00

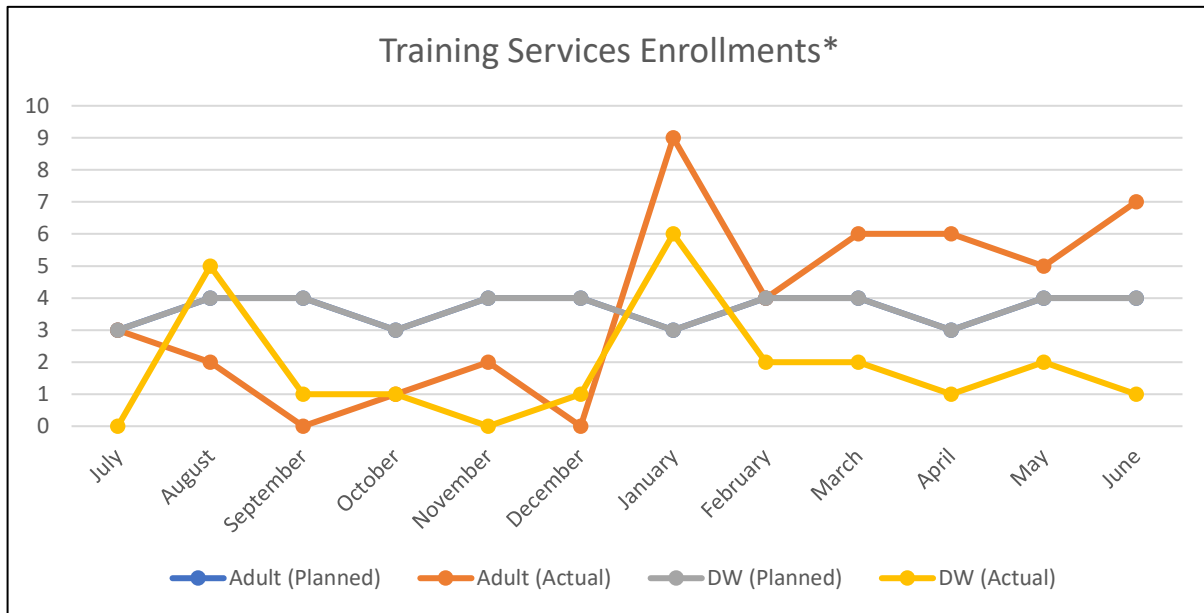
**Fourth Quarter Individual Training Agreements (ITAs)**

Training Provider	Program	Cost
Truck Driver Institute	Class A Truck Driver	\$4,970
California State University, San Bernardino	HVACR Technician – NATE Service Core	\$1,995
Truck Driver Institute	Class A Truck Driver	\$4,970
Truck Driver Institute	Class A Truck Driver	\$4,970
Central California School of Continuing Edu	Dental Assistant	\$8,000
Loyola Marymount University – LMU Extension	Human Resources Professional Online	\$2,395
Truck Driver Institute	Class A Truck	\$4,970
California State University, San Bernardino	Certified Clinical Medical Assistant	\$2,495
	Certified Administrative Professional w/MS Office	
California State University, San Bernardino	Specialist 2016	\$3,695
Central California School of Continuing Edu	Dental Assistant	\$8,000
Cuesta College	Culinary Arts CS	\$849
Cuesta College	Culinary Arts CS	\$849
Cuesta College	Culinary Arts CS	\$849
Designs School of Cosmetology	Skin Care/Esthetics	\$8,000
Simi Institute for Careers and Education	Professional Bookkeeping w/ Quickbooks 2018	\$2,195
Designs School of Cosmetology	Skin Care/Esthetics	\$8,000
Designs School of Cosmetology	Cosmetology	\$8,000

**WIOA AJCC Services  
Training  
Program Year 2018-2019: Quarter 4**



*\*Actual Training Expenditures* have been updated to reflect *actual* invoiced participant training costs for the entire program year.



*\*Adult (Planned)* is the same line as *DW (Planned)* therefore the blue line is not represented.

Tomm came to America's Job Center as a referral from the Supportive Services for Veteran Families (SSVF) program. He had moved to northern San Luis Obispo County to better provide and be close to his three children: Broc, Mycah and Ty. His varied work history included his military service, firefighting training in Illinois and long ago unfinished coursework leading to a history degree. His most recent employment was in retail middle management at \$16/hour that did not provide close to a sustainable wage for himself or his children.

Tomm received Class A truck driver training with Truck Driver Institute in Santa Maria. He drove one hour each way for the opportunity to enter a career with growth and opportunities here and that can be carried anywhere. He was actively involved from the very start and provided happy and productive regular updates and needed documentation. Thom's hard work paid off almost immediately when he found local work with Pacific Coast Supply, delivering drywall and roofing material to job sites. His wage is \$22/hour to start with room to grow.



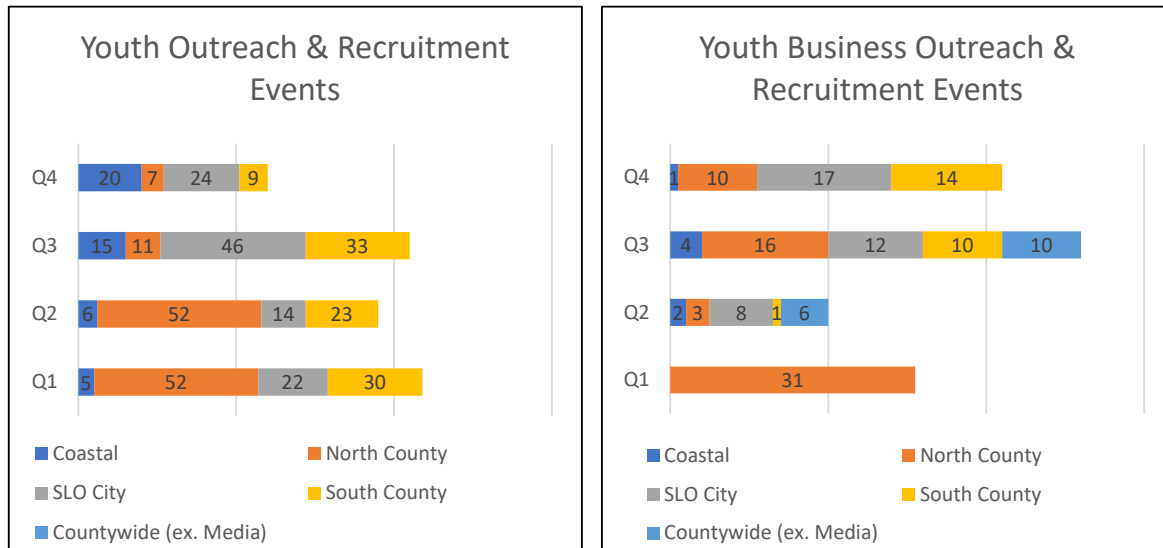
In his own words:

*Your team was easy to work with, professional and very helpful throughout the entire process. I really appreciated all the one-on-one attention.*

*Truck Driver Institute in Santa Maria was a great school - the instructors were all very knowledgeable and everyone truly cares about the students succeeding.*

**WWW.ECKERD.ORG/SLO**

**WIOA Youth Services**  
**Program Year 2018-2019: Quarter 4**



**Participant Outreach**

**Coast:** The Rock Espresso, Morro Bay Laundromat, Morro Bay Liquor, Morro Bay Chamber of Commerce, The Rock Radio Station, Morro Bay Library, Coastal Family Resource Fair, Community Center, Los Osos Middle School, Los Osos Library, Starbucks, United Way, Lions Club.

**San Luis Obispo:** Cuesta College, SLO High School, Pacific Beach High School, Prado, People's Self-Help Housing, AJCC, DOR, CASA, Youth Wellness Fair, Central Coast Freedom Network, DSS, Parent Teen Mediation, Stand Strong, YMCA, Peer Meeting Family Care Network, Drug and Alcohol, The Community Connection, CHC, Victim Witness, CapSLO, Department of Corrections.

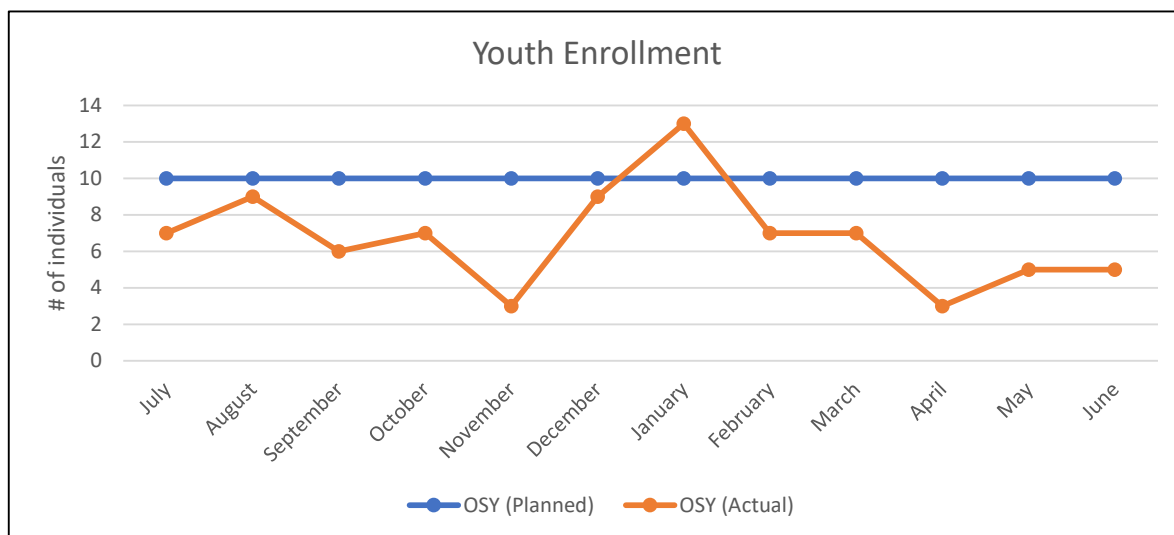
**South County:** Just 1 Job Fair, South County Chamber of Commerce, Central Coast New Tech High School, 5 Cities Homeless Coalition, Goodwill, Nipomo High School, Lucia Mar School, SAFE Meeting, Arroyo Grande High School, Arroyo Grande Library, Aspire Counseling Services.

**North County:** SENECA House, Starbucks, Atascadero Chamber of Commerce, San Joaquin College, Cuesta College, The Link.

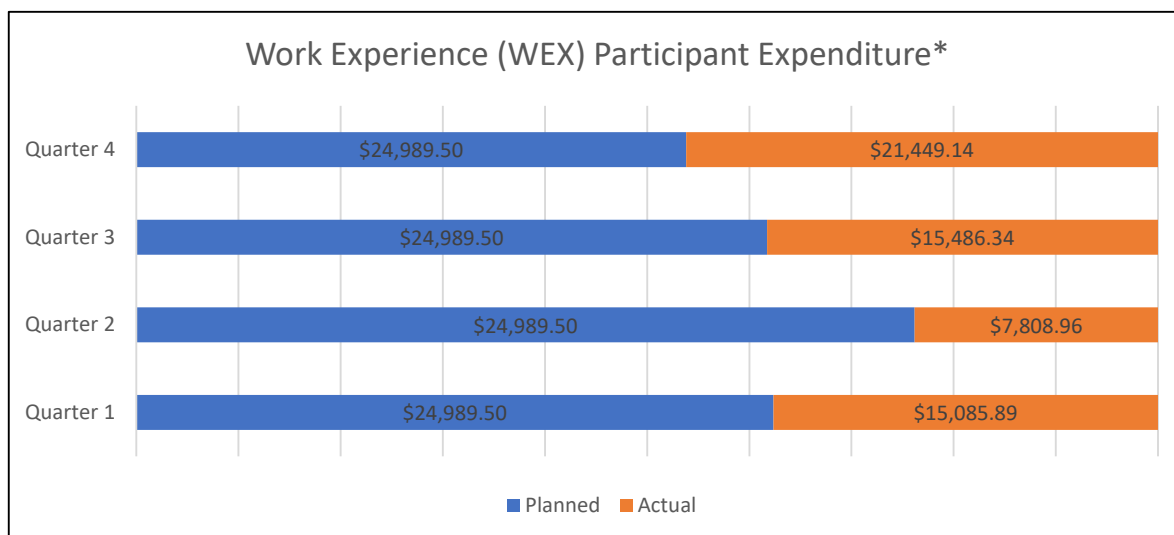
**Business Site Visits/Presentations**

The Grill Hut, Nology Computers, MGE Underground Inc., Grocery Outlet - Paso, Firestone Walker Tap Room, Suburban Propane, Paso Robles Inn, Allegretto, The Oaks Hotel & Suites, Charles Paddock Zoo, Cali Grill, Growing Grounds, Architectural Iron Works, Quicky Car Wash, SLO, Big Sky Cafe, The Kinney SLO, Sprouts Farmers Market, GameStop, Sycamore Mineral Springs Resort and Spa, Smart & Final, The Photo Shop, Splash Cafe, 99 Cents Only Store, The Equine Center, Hotel SLO, Central Coast Surf Boards, Food Bank Coalition of SLO, Taco Bell SLO, Sally's Beauty Supply, Goodwill, Arroyo Grande Care Center, Vespera On Ocean, O'Reilly Auto Parts, AutoZone, Carquest, Sandcastle Hotel on the Beach, Panera Bread, CVS, Smart & Final, Kraken Coffee Company, Izakaya Raku, California Fresh Market, Vans.

**WIOA Youth Services continued.  
Program Year 2018-2019: Quarter 4**



At the close of PY 2018-2019, the WIOA Youth program had enrolled 81 new youth into the program. Out of the 81 new youth enrollments, 25 participated in Work Experience.



*\*Actual WEX Expenditures have been updated to reflect actual invoiced participant costs. The methodology previously reported was projected participant expenditures and unable to be matched at year-close. Moving forward, actual invoiced participant expenditures will be reported. At year-end, total WEX participant costs for PY 2018-2019 were \$59,830.33.*

**Work Experience (WEX) Enrollments**

Employer	Paid/unpaid
Mobile Solar	Paid
Firestone Walker Taproom	Paid
Cali Grill	Paid
San Luis Equine Center	Paid
Arroyo Grande Care Center	Paid





Isaac has been a part of Eckerd Connects' Workforce Development program for over a year. He came to us through a referral from Juvenile Probation. Isaac had certain challenges that were hindering his ability to gain employment and pursue school. He began by attending some of the Eckerd Connects' workshops. This helped him develop career pathways and explore more options than what he considered himself able to pursue before. Isaac eventually started coming on his own just to say hi and update us on his progress.

He was hired at Burger King and quickly got promoted to shift lead. He continued to work with Eckerd Connects, taking more workshops and gaining more skills. Shortly after, he requested assistance with getting into Cuesta College. He reached a pivotal point of empowerment that encouraged him to pursue more. It's what he called "being an adult and going to college."

Isaac enrolled at Cuesta College and started taking classes towards getting his A.A. Degree to pursue a career as a therapist, so he too can help others rise up from their circumstances. He is now working at Big 5 and is a full-time student at Cuesta College.

He still frequently stops by the Paso office to just chat, get help with homework, update staff on what's new in his life or share what new goals he wishes to pursue.

Isaac may be out of the follow up portion of the program, however he still stops by the office and is a part of "the family." Everyone at Eckerd Connects is super happy and proud of him. Witnessing his progress and transformation over the past year has been a great joy for the entire team.

*"The Eckerd program gave me the ability to see myself as someone valuable and worth making my dreams happen"*

*Isaac H.*

To learn more about Eckerd Connects' services, please visit: [Eckerd.org/SLO](https://Eckerd.org/SLO)



THIS WIOA TITLE I FINANCIALLY ASSISTED PROGRAM OR ACTIVITY IS AN EQUAL OPPORTUNITY EMPLOYER/PROGRAM. AUXILIARY AIDS AND SERVICES ARE AVAILABLE UPON REQUEST TO INDIVIDUALS WITH DISABILITIES. CALIFORNIA RELAY SERVICE (CRS) 711 OR 1-800-735-2922 (ENGLISH) OR 1-800-855-3000 (SPANISH).



**Workforce Development Board**  
**ACTION ITEM**  
**August 1, 2019**

**AGENDA ITEM NUMBER: 5.3**

**SUBJECT: Receive Report on Program Year 2018-2019 Local and State Monitoring Reports**

**ACTION REQUIRED:** It is requested that the WDB review and discuss the results of the Local and State Monitoring Reports

**SUMMARY NARRATIVE:**

Federal oversight is conducted primarily at the recipient level. As such, each recipient and subrecipient of WIOA Title I funds must conduct regular oversight and monitoring of its WIOA programs and those subrecipients and contractors as required under Title I of WIOA. The oversight roles and responsibilities of recipients and subrecipients include:

- Determination that expenditures have been made against the proper cost categories and within the cost limitations specified
- Determination whether there is compliance with other provisions of WIOA and the WIOA regulations and other applicable laws and regulations
- Assurance to compliance with 2 CFR part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards)
- Determination of compliance with the nondiscrimination, disability, and equal opportunity requirements of section 188 of WIOA

The Methodology for monitoring reviews include sample testing therefore results are not a comprehensive assessment of all areas included in reviews.

**Local Monitoring – Conducted by WDB/AE Staff**

The County Department of Social Services (DSS) serves as the Fiscal and Administrative Entity (AE) for the Workforce Development Board. The AE conducted two program monitoring's on Eckerd Connects who serves as the service providers of the WIOA Youth Program and WIOA Title I Adult, Dislocated Worker and Rapid Response Programs for AJCC Services. In addition, the County of San Luis Obispo Auditor conducted the Fiscal review of Eckerd Connects.

**Program Monitoring - WIOA Title I AJCC Adult, Dislocated Worker, Rapid Response & Layoff Aversion**

This review focused on program administration, service and activities, case management, file documentation, CalJOBS data entry and participant eligibility. There were three findings that resulted in Eckerd identifying areas of improvement, training, and policy. Findings identified areas of improvement needed in:

- Grievance and Complaint Procedures
- Individual Training Accounts



- On-the-Job Training

### **Program Monitoring - WIOA Title I Youth**

This review focused on program administration, service and activities, case management, file documentation, CalJOBS data entry and participant eligibility. Findings identified areas of improvement needed in:

- Work Experience (WEX)

### **WIOA Fiscal & Procurement - AJCC (Adult/DW/RR/LA) and WIOA Youth Contracts**

Three findings were identified under the requirement of financial management systems to disclose accurate, current, and complete financial results. Findings identified areas of improvement needed in:

- Program invoices reconciling to Eckerd's general ledger
- Incorrectly charging 100% to WIOA Youth program, supporting documentation notated should only be allocated 75% of total invoice amount
- Allocation methodology not substantiated with current supporting documentation

Eckerd Management continues to monitor and evaluate all staff activities, processes and policies to ensure continuous quality improvement for their clients and adherence to WIOA local and federal policies. The County continues to provide ongoing technical assistance as needed.

### **State Monitoring – Conducted by EDD staff**

The Administrative Entity participated in three monitoring's conducted by the State of California Employment Development Department (EDD) including program monitoring, fiscal monitoring, and WIOA Section 188 Compliance monitoring.

### **Program Monitoring - WIOA Title I Program**

The Program Monitoring reviews for compliance with applicable federal and state laws, regulations, and policies related to the WIOA including Program Administration such as Workforce Development Board, AJCC, Oversight and Monitoring; Program Operations including Eligibility, Training Services, Supportive Services, Youth Services, Rapid Response; and AJCC Structure.

- During this review *no findings* or concerns were identified

### **WIOA Section 188 Compliance**

The WIOA Section 188 Compliance Monitoring Review includes evaluation of compliance of Nondiscrimination and Equal Opportunity Program including Affirmative Outreach, Data and Information Collection Maintenance, and Monitoring Recipients for Compliance. Findings identified areas of improvement needed in:

- Data and Information Collection and Maintenance.
  - WIOA Program participants medical and disability-related information was collected on internal program forms.
  - As of May 17, 2019, all forms identified were revised to remove any questions related to medical and disability-related information. Also, all

active file forms were redacted with all inactive file forms redacted by Program Year close.

### **WIOA Fiscal & Procurement**

The WIOA Fiscal and Procurement Monitoring Review focuses on fiscal policy and procedures, financial reporting, expenditures charged to WIOA, cost allocation, indirect cost rate, cash management, internal controls, oversight of subrecipients, subrecipient audits, debt collection, procurement transactions, and property management.

- During this review *no findings* or concerns were identified

### **BUDGET/FINANCIAL IMPACT:**

No current fiscal impact.

### **STAFF COMMENTS:**

The WDB is responsible to ensure that its systems, programs, and related activities comply with the WIOA grant program, federal and state regulations, and applicable state directives. Therefore, the WDB is responsible for any deficiencies identified in subsequent reviews or audits.