



**Workforce Development Board**  
**Wednesday, December 9, 2020 @ 8:30 a.m.**  
**18 W. Beach St. Watsonville**

18 W. Beach Street  
 Watsonville, CA 95076  
 (831) 763-8900  
[www.santacruzwb.com](http://www.santacruzwb.com)

[Click Here to Join the Meeting Online](#)

If you don't have Microsoft Teams: Select the "Continue on this browser" option

**Call in: (916) 318-9542**  
**Meeting ID: 209 564 450#**

**MEMBERS:**

- Carol Siegel, WDB Chair
- Rob Morse, WDB Vice Chair  
Pacific Gas and Electric Company
- Lamont Adams  
Local IBEW234
- Alia Ayyad  
Center for Employment Training
- Diane Berry-Wahrer  
California Department of Rehabilitation
- Katie Setzler  
Palo Alto Medical Foundation
- Christina Cuevas  
Cabrillo College
- MariaElena De La Garza  
Community Action Board
- Marshall Delk  
Santa Cruz County Bank
- Elyse Destout  
Photography by Elyse Destout
- Yuko Duckworth  
Employment Development Department
- Candice Elliott  
Fortress and Flourish
- Sean Hebard  
Carpenters Local 505
- Carmen Herrera-Mansir  
El Pajaro CDC
- Todd Livingstone  
Watsonville/Aptos Adult Education
- Barbara Mason  
Santa Cruz County Economic Development
- Chris Miller  
ScratchSpace, LLC
- Elisa Orona  
Health Improvement Partnership of SC County
- Shaz Roth  
Pajaro Valley Chamber of Commerce and Agriculture
- Glen Schaller  
Monterey Bay Central Labor Council, AFL-CIO
- Dustin Vereker  
Discretion Brewing
- DIRECTOR:**  
Andy Stone

**Agenda**

- I. Call to Order/Welcome**
- II. Public Comment**
- III. Director's Report**
- IV. Consent Items**
  - C.1 Approval of Minutes: September 16, 2020 meeting..... **2-6**
  - C.2 Data Dashboard ..... **7-8**
  - C.3 AJCC Hallmarks of Excellence Action Plans PY2020/21 Q1 ..... **9**
  - C.4 Contractor Activity Reports PY 2019/20 Q4 ..... **10**
  - C.5 WIOA Performance Negotiations PY 2020-2022..... **11-12**
  - C.6 WIOA Transitional Jobs Policy ..... **13-19**
- V. Presentation**
  - P.1 Jessica Daugherty, Principal, causeIMPACTS  
Building and Maintaining an Effective Board ..... **20**
- VI. Administration**
  - A.1 WDB Staff Updates ..... **21**
  - A.2 Strategic Plan Report Update..... **22-23**
- VII. Chairperson's Report**
- VIII. Adjournment**

**Next Meeting: Workforce Development Board**  
**Thursday, April 1, 2021 @ 8:30 a.m.**  
**Location TBD**

*Santa Cruz County Workforce Development supports the Community by cultivating economic vitality and assisting Jobseekers by creating programs to train, educate, and support the workforce to develop key and timely skills. We assist Business to secure the talent they need to thrive now, and into the future.*

*The County of Santa Cruz does not discriminate on the basis of disability, and no person shall, by reason of a disability, be denied the benefit of the services, programs, or activities. This meeting is located in an accessible facility. If you are a person with a disability and require special assistance in order to participate in the meeting, please call (831) 763-8900 (TDD/TTY- 711) at least 72 hours in advance of the meeting in order to make arrangements. Persons with disabilities may request a copy of the agenda in an alternative format. As a courtesy to those affected, please attend the meeting smoke and scent free.*



Action Consent Information Discussion

SANTA CRUZ COUNTY  
**WORKFORCE**  
DEVELOPMENT

## C.1 Approval of Meeting Minutes

<b>COMMITTEE:</b> Workforce Development Board	<b>MEETING DATE:</b> December 9, 2020
<b>STAFF NAME:</b> Andy Stone, WDB Director; Laurel Gazza, Administrative Aide	

**SUMMARY:**

Requesting Consent approval of the September 16, 2020 Full WDB meeting minutes.

Attachment(s)

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**SUGGESTED MOTION: (if applicable)**

I move to approve the September 16, 2020 Full WDB Board meeting minutes.

<b>COMMITTEE DATE</b>	<b>COMMITTEE APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:
<b>BOARD DATE</b>	<b>BOARD APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:



**Workforce Development Board  
Full Board Meeting  
Watsonville Career Center,  
18 W. Beach Street, Watsonville CA.  
Wednesday, September 16, 2020, 8:30 a.m.**

**C.1 Attachment**

18 W. Beach Street  
Watsonville, CA 95076  
(831) 763-8900  
[www.santacruzwb.com](http://www.santacruzwb.com)

**NOTE: Due to the COVID-19 pandemic, and the directive of Governor Gavin Newsom in adjusting the Brown Act rules, public meetings will be allowed to be attended virtually until further notice. A public meeting room was made available for this meeting, but all participants chose to attend virtually, via Microsoft Teams.**

**Chair Carol Siegel called the meeting to order at 8:31 a.m., when a quorum of 19 members were present. All Board members and guests attended the meeting virtually.**

**Board Members in Attendance**

- Adams, Lamont
- Ayyad, Alia
- Berry-Wahrer, Diane
- Cuevas, Christina
- De La Garza, MariaElena
- Delk, Marshall
- Destout, Elyse
- Duckworth, Yuko
- Elliott, Candice
- Hebard, Sean
- Herrera-Mansir, Carmen
- Livingstone, Todd
- Mason, Barbara
- Miller, Chris
- Morse, Rob – Vice Chair
- Roth, Shaz
- Setzler, Katie
- Siegel, Carol – Chair
- Vereker, Dustin

**Board Members Absent**

- Orona, Elisa
- Schaller, Glen

**MEMBERS:**

- Carol Siegel, Chair  
Santa Cruz Seaside Company
- Rob Morse, Vice Chair  
Pacific Gas and Electric Company
- Lamont Adams, Business Manager  
IBEW, Local 234
- Alia Ayyad, Director  
Center for Employment Training
- Diane Berry-Wahrer, Supervisor  
California Department of Rehabilitation
- Katie Setzler, Director of Human Resources  
Palo Alto Medical Foundation
- Christina Cuevas, Program Director  
Community Foundation of Santa Cruz County
- MariaElena De La Garza  
Executive Director  
Community Action Board
- Marshall Delk, Vice President  
Santa Cruz County Bank
- Elyse Destout, Owner  
Photography by Elyse Destout
- Yuko Duckworth  
Employment Program Manager  
Employment Development Department
- Candice Elliott, Principal Consultant  
Fortress and Flourish
- Sean Hebard  
Carpenters Local 505
- Herrera-Mansir, Carmen  
El Pajaro CDC
- Todd Livingstone, Assistant Director  
Career and Technical Education  
Watsonville/Aptos Adult Education
- Barbara Mason,  
Economic Development Coordinator  
Santa Cruz County Economic Development
- Miller, Chris, President  
ScratchSpace, Inc.
- Orona, Elisa, Executive Director  
SC Health Improvement Partnership
- Shaz Roth, President/CEO  
Pajaro Valley Chamber of Commerce  
and Agriculture
- Glen Schaller, Political Coordinator  
Monterey Bay Central Labor Council, AFL-CIO
- Dustin Vereker, Chief Beer Ambassador  
Discretion Brewing Co.

**DIRECTOR:  
Andy Stone**

**Staff in Attendance**

Beardsley, David – Sr. Analyst  
Chevalier, Katy – EBSD Program Manager  
Gazza, Laurel – WDB Administrative Aide  
Gray, Lacie – WDB Sr. Analyst  
Montes, Josie – EBSD Assoc. Analyst  
Paz-Nethercutt, Sara – WDB Sr. Analyst  
Spickler, Adam – CCU Contracts Analyst  
Stone, Andy - WDB Director

**Guests**

Bashay, Molly – Center for Law and Social Policy  
Mears, Haley – Monterey Bay Economic Partnership  
Michel, Henry – Santa Cruz County Office of Education  
Moss, Denise – Cabrillo College  
Munoz, Beatriz – Santa Cruz County Office of Education, Suenos  
Peterson, Kimberly – EBSD Director  
Sanson, Sony – Santa Cruz County Office of Education  
Winter, Amanda – Career Center Operator

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**Subject: II. Public Comment**

There was no public comment.

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**Subject: III. Directors' Report**

WDB Director Andy Stone gave a brief statement on how the WDB is coping with the COVID-19 pandemic and the fires in the area.

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**Subject: IV. Approval of Consent Agenda**

- C.1 – Approval of May 27, 2020 Meeting Minutes**
- C.2 – Data Dashboard**
- C.3 – AJCC Hallmarks of Excellence Action Plan PY 2020/21**
- C.4 – Contractor Activity Reports PY 2019/20 Q3**
- C.5 – Re-contracting Updates PY 2020-21**
- C.6 – WIOA PY 2020/21 Budget and Updates**
- C.7 – ETPL Annual Report**
- C.8 – WIOA Co-enrollment Policy**
- C.9 – WDB Member Recruitment Update**

**Action:** It was moved to approve the Consent Agenda.

**Status:** Motion to Approve: Marshall Delk  
Motion Seconded: Sean Hebard  
Abstentions: None  
Committee Action: All in favor, motion passed.

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**V. Presentation:**

Molly Bashay, Senior Policy Analyst for Center for Law and Social Policy gave a presentation on Racial Equity in Workforce Development.

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**Subject: VI. Administration items:**

**A.1 WDB Staff Response to COVID-19**

WDB staff gave current report outs on WIOA/Business Services/CalWORKs Employment Services programs affected by the COVID-19 crisis, and changes that have been implemented to better serve clients during the pandemic. WDB Director also announced that Peter Detlefs had been hired to replace outgoing Business Services Manager Belinda Barr, who left in July 2020.

**Action:** None, informational item only

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**A.2 Strategic Plan Report Update**

WDB Director Andy Stone recapped the current status of accomplishments for the three main Strategic Plan goals for Workforce Santa Cruz County. Board member Carmen Herrera-Mansir expressed a desire to make entrepreneurship a part of the Strategic Plan in the future, and Board member MariaElena De La Garza stated that she wanted racial equity goals to be added to the Strategic Plan. Director Andy Stone made note that motion for approval to be amended to include racial equity.

**Action:** It was moved to accept the WDB Directors' Operational Plan Update for PY 2020-21, with the amendment of also establishing and adding racial equity goals to the Strategic Plan.

**Status:** Motion to Approve: Christina Cuevas  
Motion Seconded: Elyse Destout  
Abstentions: None  
Committee Action: All in favor, motion passed as amended.

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**Chairperson's Report:** WDB Chair Carol Siegel thanked everyone on the WDB board and staff for their participation and contributions and thanked the meeting guests for attending.

**Meeting adjourned at 10:27 a.m.**

**Next Meeting:** Executive Committee Meeting  
Wednesday, November 4, 2020 @ 8:30 a.m.  
Watsonville Career Center  
18 W. Beach Street, Watsonville, CA.

Workforce Development Board  
Wednesday, December 9, 2020 @ 8:30 a.m.  
Location – Watsonville Career Center  
18 W. Beach Street, Watsonville CA.



Action  Consent  Information  Discussion

SANTA CRUZ COUNTY  
**WORKFORCE**  
DEVELOPMENT

## C.2 Data Dashboard

<b>COMMITTEE:</b> WDB Full Board	<b>MEETING DATE:</b> December 9, 2020
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**STAFF NAME:** Andy Stone, WDB Director; Laurel Gazza, Administrative Aide

### SUMMARY:

In addition to the Data Dashboard, Workforce Santa Cruz County responded to 225 layoffs during PY 20-21, thru Quarter 1. (85 so far in Q2) Specific employer information, (Layoffs/Industry/Employer/Location) can be found at: <https://bit.ly/3aIXs1C>

Attachment(s)

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### SUGGESTED MOTION: (if applicable)

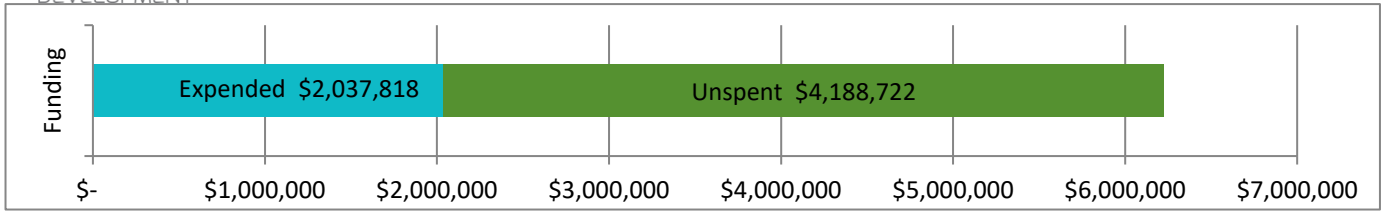
N/A

<b>COMMITTEE DATE</b> 11/04/20	<b>COMMITTEE APPROVAL:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Other:
<b>BOARD DATE</b>	<b>BOARD APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:

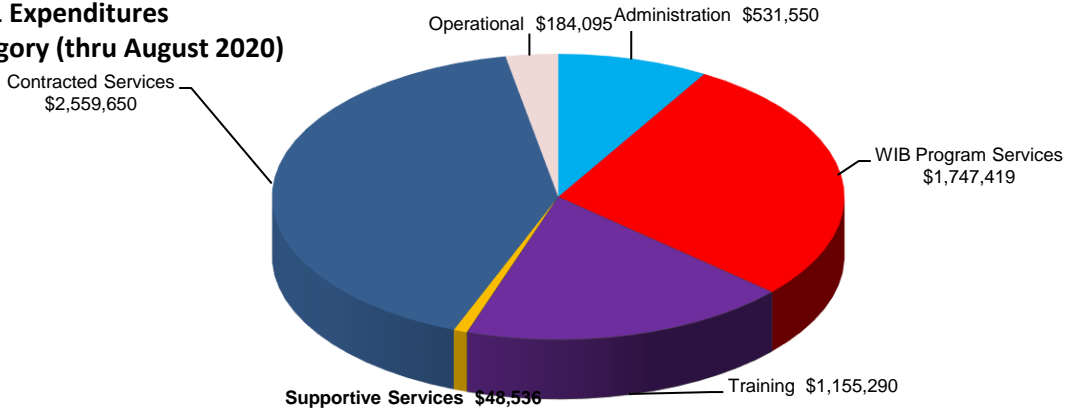
PY 2020/2021 thru September 30, 2020



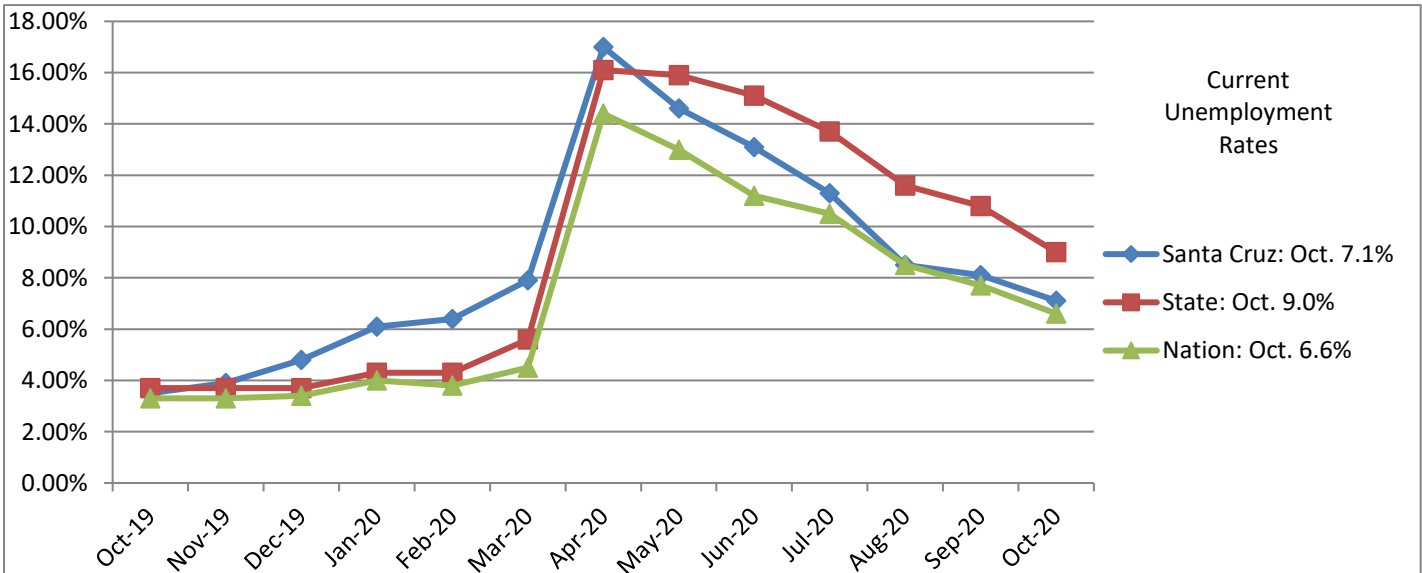
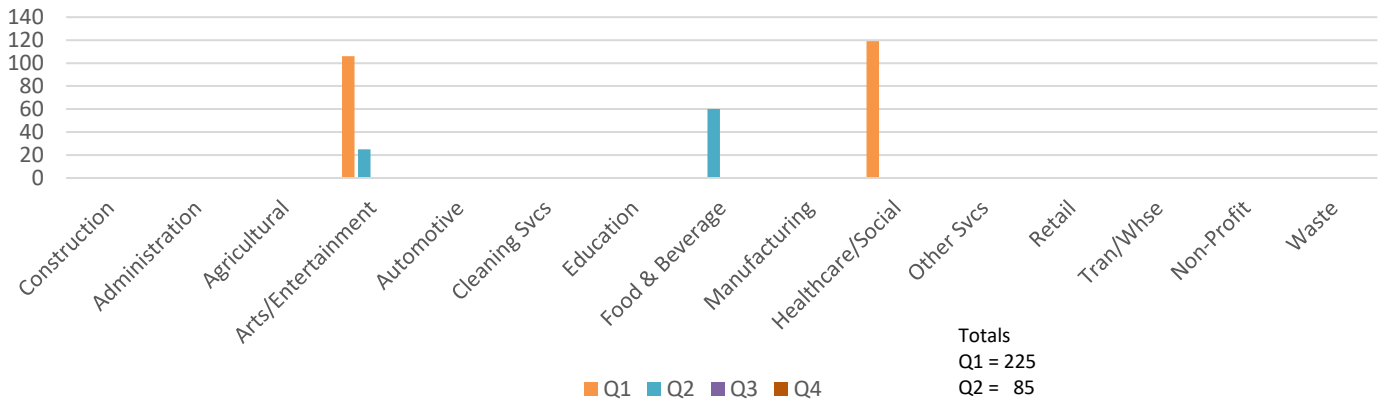
Program Year (PY) 2020-21 Budget: \$6,226,540



**2020-21 Expenditures by Category (thru August 2020)**



**Layoffs by Industry 2020-2021**







Action Consent Information Discussion

### C.3 Hallmarks of Excellence Plans

<b>COMMITTEE:</b> Workforce Development Board	<b>MEETING DATE:</b> December 9, 2020
<b>STAFF NAME:</b> Andy Stone, WDB Director; Sara Paz-Nethercutt, Sr. Analyst	

**SUMMARY:**

Background:

As you may recall, on September 11, 2018, the WDB approved the Hallmarks of Excellence Assessment and Certification Action Plan for the Comprehensive AJCC. Using the criteria and procedures established by the State Board, the independent and objective assessment will be conducted every three (3) years and will be due again to the State in 2021.

Under EDD guidance Directive WSD, 18-11, March 14, 2019, this same methodology was applied to the other AJCC sites at the Capitola Employment Development Department (EDD) and WIOA Youth Suenos. This process was submitted to the state by the deadline of June 30, 2019 and will be in effect for two (2) years in order to align with the comprehensive AJCC certification due in 2021.

Update: Program year action plans for each AJCC site have been developed and progress is displayed for your review.

The link to view the action plans is found here: <https://bit.ly/36v7qoC>

Attachment(s)

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**SUGGESTED MOTION: (if applicable)**

I move to direct WDB staff to continue working on Hallmarks of Excellence Action Plans and to report back to the committee on ongoing progress.

<b>COMMITTEE DATE</b> 11/04/20	<b>COMMITTEE APPROVAL:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Other:
<b>BOARD DATE</b>	<b>BOARD APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:



Action  Consent  Information  Discussion

## C.4 Contractor Activity Reports

<b>COMMITTEE:</b> Workforce Development Board	<b>MEETING DATE:</b> December 9, 2020
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**STAFF NAME:** Andy Stone, WDB Director; Katy Chevalier, Program Manager; Sara Paz-Nethercutt, Sr.Analyst

**SUMMARY:**

Reports outlining each workforce services contractor's financial, federal (if applicable), and contract performance can be found here : <https://bit.ly/3g5dhUO>

Attachment(s)

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**SUGGESTED MOTION: (if applicable)**

<b>COMMITTEE DATE</b> 11/04/20	<b>COMMITTEE APPROVAL:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Other:
<b>BOARD DATE</b>	<b>BOARD APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:



Action  Consent  Information  Discussion

SANTA CRUZ COUNTY  
**WORKFORCE**  
DEVELOPMENT

## C.5 WIOA Performance Negotiations

<b>COMMITTEE:</b> Workforce Development Board	<b>MEETING DATE:</b> December 9, 2020
<b>STAFF NAME:</b> Andy Stone, WDB Director; Sara Paz-Nethertcutt, Sr. Analyst	

### SUMMARY:

Workforce Innovation and Opportunity Act (WIOA) requires the state to negotiate local level performance goals for Adult, Dislocated Worker and Youth programs. Agreement was reached on local goals that will be in effect for two (2) Program Years at a time. 2020/2021 and 2021/2022.

The attached chart demonstrates the goals for each of the performance measures for each program for the two-year period.

As per Employment Development Department (EDD) Workforce Services Directive (WSD20-02) dated September 18, 2020, the state will assess performance at the end of each program year using the Statistical Adjustment Model (SAM), derived by the Department of Labor, to determine if the negotiated performance goals were achieved. Actual performance numbers will be adjusted using the SAM which factors in data on the local economic conditions and populations served during the program year. The actual performance numbers will be compared to the SAM adjusted numbers against the negotiated performance goals to determine the ultimate level of performance success.

Attachment(s)

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### **SUGGESTED MOTION: (if applicable)**

N/A

<b>COMMITTEE DATE</b>	<b>COMMITTEE APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:
<b>BOARD DATE</b>	<b>BOARD APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:

## WIOA Performance Negotiations

<b>Local Workforce Development Area: Santa Cruz County</b>		
<b>Performance Indicators</b>	<b>Final Negotiated Goals</b>	
	PY20	PY21
<b>Adult</b>		
Employment Rate in 2nd Q post exit	<b>67%</b>	<b>67%</b>
Employment Rate in 4th Q post exit	<b>66%</b>	<b>66%</b>
Median Earnings	<b>\$8,700</b>	<b>\$8,700</b>
Credential Attainment Rate	<b>60%</b>	<b>60%</b>
Measureable Skill Gain	<b>50%</b>	<b>50%</b>
<b>Dislocated Worker</b>		
Employment Rate in 2nd Q post exit	<b>71.9%</b>	<b>71.9%</b>
Employment Rate in 4th Q post exit	<b>72.5%</b>	<b>72.5%</b>
Median Earnings	<b>\$10,750</b>	<b>\$10,750</b>
Credential Attainment Rate	<b>60%</b>	<b>60%</b>
Measureable Skill Gain	<b>50%</b>	<b>50%</b>
<b>Youth</b>		
In Ed,Trng or Employment Rate in 2nd Q post exit	<b>74.6%</b>	<b>74.6%</b>
In Ed,Trng or Employment Rate in 4th Q post exit	<b>71%</b>	<b>71%</b>
Median Earnings	<b>\$3,800</b>	<b>\$3,800</b>
Credential Attainment Rate	<b>60%</b>	<b>60%</b>
Measureable Skill Gain	<b>56.4%</b>	<b>56.4%</b>



Action Consent Information Discussion

## C.6 WIOA Transitional Jobs Policy

<b>COMMITTEE:</b> Workforce Development Board	<b>MEETING DATE:</b> December 9, 2020
<b>STAFF NAME:</b> Andy Stone, WDB Director; Sara Paz-Nethercutt, Sr.Analyst	

### SUMMARY:

The Workforce Innovation and Opportunity Act (WIOA) mission/vision is to strengthen our nation's public workforce system, help Americans with barriers to employment access the education, training and support services needed to obtain and advance in quality jobs and careers.

Attached is a local WIOA policy developed to make available work experience opportunities through a transitional jobs program to WIOA eligible participants with barriers to employment who are chronically unemployed or have inconsistent work history. Providing this type of opportunity aligns with the WIOA and further advances the mission of the Act for helping those with barriers to access training and education, support services they need to obtain jobs.

Attachment(s)

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### **SUGGESTED MOTION: (if applicable)**

I move to approve the locally developed WIOA Transitional Jobs policy.

<b>COMMITTEE DATE</b> 11/04/20	<b>COMMITTEE APPROVAL:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Other:
<b>BOARD DATE</b>	<b>BOARD APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:



## **WIOA Transitional Job Policy**

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### **Policy Memorandum 20-02**

**Date:** October 16, 2020

**To:** All Workforce Innovation Opportunity Act (WIOA) Service Providers

**Purpose:** To provide guidance to contractors (service providers) for transitional jobs, as a type of work experience opportunity, offered as an individualized career service for WIOA eligible clients.

**Rescissions:** N/A

**References:** WIOA Sections 3, 134 (c)(3)(D); 20 CFR 680.200; 20 CFR 680.190-195; 20 CFR 680.840; 20 CFR 680.900; 20 CFR 683.270; Employment and Training Guidance Letter WIOA, No.19-16, March 1, 2017; Employment Development Department, Workforce Services Directive 19-06, December 27, 2019, CalJOBS Activity Codes

### **Background:**

The Santa Cruz County Workforce Development Board (WDB) will make available work experience opportunities through a transitional jobs program for those Workforce Innovation and Opportunity Act (WIOA) eligible Adult and Dislocated Worker participants with barriers to employment who are chronically unemployed or have inconsistent work history. Providing this type of opportunity aligns with the WIOA mission/vision of strengthening our nation's public workforce system, helping Americans with barriers to employment access the education, training and support services needed to obtain and advance in quality jobs and careers.

At the discretion of the local Workforce Development Board, this Transitional Job Policy is subject to change.

### **Policy:**

#### **A. General Provisions**

A transitional job, combined with job readiness skills training, is designed to assist participants with establishing a work history, demonstrate success in the workplace, and develop the skills that lead to entry into and retention in unsubsidized employment. Transitional jobs provide participants with work experience and an opportunity to develop important workplace skills within the context of an employee-employer relationship.

#### **B. Local Policy Guidelines and Requirements**

##### **1. Eligibility**

Contractor service provider shall first determine WIOA eligibility by applying the WIOA regulations, federal guidance, state directives and local policy, when applicable.

To be eligible for a transitional job, the participant is experiencing one of the following:

- a. Barriers to employment, defined as being a member of one (1) or more of the following populations<sup>1</sup>:
  1. Displaced homemakers,
  2. Low-income individuals,
  3. Indians, Alaska Natives, and Native Hawaiians as defined in Section 166,
  4. Individuals with disabilities,
  5. Older individuals,
  6. Ex-offenders,
  7. Homeless individuals,
  8. Youth who are in or have aged out of the foster care system,
  9. Individuals who are English language learners, individuals who have low levels of literacy, and individuals who are facing substantial cultural barriers,
  10. Eligible migrant and seasonal farmworkers, as defined in Section 167(i),
  11. Individuals within two (2) years of exhausting lifetime TANF eligibility,
  12. Single parents,
  13. Long-term unemployed; **and who are**
- b. Chronically unemployed, defined as long-lasting or habitual and problematic **or**
- c. Inconsistent work history, despite being able and willing to work, defined as never held a job or gaps in work history that cannot be explained by recent economic conditions.

Eligibility for WIOA is documented via CalJOBS data entry and case file records. Eligibility for transitional job program must be documented in the case file records and may be accomplished via an assessment and self-attestation.

## 2. Individualized Career Services

As part of the WIOA menu of services offered as an individualized career service, a WIOA eligible participant may be eligible for a type of work experience as a WIOA funded subsidized job placement. Transitional jobs must be combined with comprehensive career services and supportive services.

The **assessment** of the individual will determine the need, length of the transitional job and the skills needed for entry into and retention in unsubsidized employment. An **Individual Employment Plan (IEP)** shall be developed with the transitional job identified as part of the overall employment goals for the individual.

**Job readiness skills training** shall be offered in conjunction with the transitional job placement to address existing challenges and develop successful outcomes. Job readiness skills training provides the tools necessary to be successful in the workplace and will include competencies needed to perform specific tasks on the job. Job readiness skills training shall be provided via the WDB approved platform or contract service provider method approved by the WDB Director. Job readiness skills training shall include, but is not limited to, the following components:

- ✓ Personal maintenance
- ✓ Punctuality
- ✓ Attendance
- ✓ Dependability

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<sup>1</sup> WIOA Section 3 (24)

As the transitional job placement is nearing completion, **Job Search** assistance shall be provided to assist the individual with obtaining unsubsidized employment. Job Search assistance shall be provided via the WDB approved platform or contract service provider methodology approved by the WDB Director.

Job search assistance shall include the following components:

- ✓ resume writing,
- ✓ interviewing skills
- ✓ networking, and
- ✓ customized job search strategy, including specific labor market information

Other individualized career services that may be offered and provided to the individual include the following:

- ✓ Financial Literacy Services
- ✓ Career Planning
- ✓ English language acquisition and integrated education and training programs

Appropriate corresponding CalJOBS activity codes and case note entries shall be created by the contracted service provider as indicated in section 6 below.

### **3. Benchmarks/Progress Reports**

Contracted service provider shall document the Job Readiness Skills training benchmarks completed over the course of the transitional job placement when the individual is 50% completed and again at the conclusion of the placement.

The employer will also provide an evaluation to document the overall individual employment performance during the course of the placement.

Contracted service provider will use the WDB approved Progress Report form or submit a version for WDB approval.

As a real-time WIOA performance measure, contracted service provider shall track the individuals' performance using the Measurable Skills Gains – Skills Progression fields in CalJOBS.

### **4. Compensation**

A transitional job must be a paid work experience. Wages for participants in transitional job placements shall, at a minimum, meet the applicable State and Federal minimum wage requirements in place at the time of the transition job placement. The participant may be paid the wage applicable to the assigned position with a corresponding job description within the business.

Contracted service provider shall be reimbursed at 100% of the wage. Participants shall only be paid for the hours worked during the transitional job period and documented on the participants timecard.

The overall compensation shall be capped at the amount in the local Individual Training Account (ITA) policy, for in-demand employment opportunities, in place at the time the transitional job starts.



## 5. Length of placement/training time limits

Placements will be limited in duration as appropriate to the needs of the individual. The length of training time shall not be less than 240 hours and shall not exceed six (6) months or 1040 hours, transitional jobs shall be for a minimum of twenty (20) hours per week.

## 6. CalJobs Data Entry

Transitional Job activities shall be tracked via the CalJOBS, the state case management system, including but not limited to the following:

### a. Activity Codes

- Initial Assessment: Activity Code: 102
- Objective Assessment: Activity Code: 203
- **Development of Individual Employment Plan (IEP); Activity Code: 205**
- Short-Term Prevocational Services: Activity Code: 215
- **Job Readiness Skills: Activity Code: 322**
- **Transitional Job: Activity Code: 321**
- Job Search: Activity Code: 125
- **Supportive Services:** Activity Codes 180-192: as appropriate based on service provided

**Bolded** activities **must** be combined when participating in a transitional job.

### b. Case Note Entry

WIOA contracted service provider staff shall create a CalJOBS case note entry to document the rationale for the transitional job placement and supportive service provided and to detail each activity. For example:

Subject: Transitional Job Factors

Case note should address the following: individual barrier; chronically unemployed or inconsistent work history rationale/justification.

Subject: Supportive Services (TJ)

Case note should document the need for supportive services, following the local supportive service policy parameters.

Contractor shall create a CalJOBS case note entry to justify any policy exceptions authorizations.

## 7. Work Site Exclusions

WIOA funds may not be used for a work experience that promotes or supports the use, possession or distribution of cannabis (marijuana).

## C. Contracted Service Provider Responsibilities/Employer of Record

WIOA contracted service provider shall comply with this local transitional job policy and shall be monitored for compliance with provisions. WIOA contracted service provider shall ensure that records and documentation required for policy compliance are kept in the case file and made available by local, state and federal monitors. Failure to comply with the requirements may result in the service provider being placed on a corrective action and/or incur disallowed costs.

WIOA Adult and Dislocated Worker contracted service provider shall be the *Employer of Record* for transitional jobs participants. As the *Employer of Record*, the contractor shall utilize the following document/forms for this program:

**1. Worksite Agreement**

This documents the employer/business name, placement job title, duration of job placement, rate of pay and WIOA required elements for participation (ie. WIOA Section 188). The agreement must be signed by all parties prior to the start of the transitional job activity. This document shall be provided to the WDB contract analyst upon being executed between the employer and the contracted service provider.

**2. Timecard**

This provides documentation signed by both employer and WIOA participant attesting to the hours worked in a pay period (either weekly or bi-weekly).

**3. Transitional Job Progress Report**

This provides a status, by the employer, on the participants job readiness skills during the transitional job placement.

WIOA contracted service provider shall submit an invoice cover page, timecards and progress reports to the WDB Contract analyst on a monthly basis for contracted service provider reimbursement from the County WDB funds.

Contracted service provider shall be responsible for creating the corresponding data entry codes in CalJOBS.

In the event, the service provider desires to create forms to enhance the flow of the transitional job program, WDB Director or designee must first approve the forms. Approved forms shall be made accessible via *Dropbox*. Upon approval, the service provider shall train their staff on any new forms and/or procedures.

**D. Employer Requirements**

Employers willing to work with participants in transitional job activities may be from the public, private or non-profit sectors. Employer must be able to provide supervision, complete the timecards, employment evaluation and/or progress reports as required (or at designated intervals: ½ way through and conclusion).

This work experience opportunity may not be used to directly or indirectly aid in filling a job opening which is vacant because the former occupant is on strike, or is being locked out in the course of a labor dispute, or the filling of which is otherwise an issue in a labor dispute involving work stoppage.

There is no expectation that the employer will retain the participant at the completion of the transitional job. However, if the employer is interested in hiring the participant after the transitional job activity has been completed, and additional training is needed, an On-the-Job-Training (OJT) may be developed that follows the requirements of the local OJT Policy.

**E. Supportive Services**

Transitional jobs must be combined with supportive services. WIOA case manager will arrange for the WIOA eligible participant to receive supportive services concurrently.

WIOA Service Providers will arrange for supportive services during the job placement period to eliminate barriers and improve retention according to the WDB's *Supportive Service Policy*. This may include work clothing, tools, childcare, finger printing, and transportation assistance. The need for supportive services will be documented in the Employment Plan or Career Advancement Plan, as well as CalJOBS case notes. The need will be revised as appropriate.

Supportive services are paid based on an approved invoice and backed up by receipts and/or provider signatures. Supportive Services claims will be submitted on a monthly basis but no later than 30 days after the conclusion of the training activity.

CalJOBS data entry: Activity Code corresponds to the Supportive Service category. Using the Commit and Pay (CnP) system, WIOA Service Providers will track Supportive Service amounts authorized and stay within budget allocation and the WDB *Supportive Service Policy*.

#### **F. Availability of Funding/Funding Limitations**

Santa Cruz County Workforce Development Board (WDB) may use up to 10% of the combined adult and dislocated worker local allocations for transitional jobs. County Fiscal Staff will track the annual funding allocated to the transitional jobs program. Transitional Job funds distribution is ultimately contingent upon the availability of funds.

#### **G. Exception to policy**

Under special circumstances, on a case-by-case basis and with proper justification, WIOA Service Providers could request a waiver of a policy provision **regarding duration of the placement and or exceeding the ITA amounts (as per local ITA policy)** from the WDB Sr. Analyst and with approval from the Workforce Development Board Director.

WIOA Service Providers should submit an ITA Policy Exception Memo (Attachment III) with the explanation and justification for the exception.

**Action:** All WIOA Service Providers shall comply with the attached Transitional Job policy. This policy memorandum is on-going and effective immediately.

**Inquiries:** Any questions regarding this policy memorandum may be directed to the WDB Director.

#### **Documents/forms referenced:**

- I. Transitional Job Worksite Agreement
- II. Transitional Job Progress Report
- III. ITA Policy Exception Memo

This policy authorized by:



**Workforce Development Board  
Guest Presenter  
December 9, 2020**

18 W. Beach Street  
Watsonville, CA 95076  
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**P.1 Building and Maintaining an Effective Board**



**Jessica Daugherty**  
Principal  
causeIMPACTS



Action  Consent  Information  Discussion

SANTA CRUZ COUNTY  
**WORKFORCE**  
DEVELOPMENT

## A.1 WDB Staff Updates

<b>COMMITTEE:</b> Workforce Development Board	<b>MEETING DATE:</b> December 9, 2020
<b>STAFF NAME:</b> Andy Stone, WDB Director; WDB Staff	

**SUMMARY:**

Workforce Development Board Staff will report out on recent developments on all program services.

**WIOA Career Services:**

1. WIOA Staffing: GCC staff at Capitola EDD; GCC fully staffed
2. National Dislocated Worker Grant application: August Wildfires

**Business Services:**

1. New Business Services Manager, Peter Detlefs
2. Small Business Grants - CARES Act

**CalWORKs Employment Services:**

1. Eviction Prevention Program

Attachment(s)

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**SUGGESTED MOTION: (if applicable)**

<b>COMMITTEE DATE</b>	<b>COMMITTEE APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:
<b>BOARD DATE</b>	<b>BOARD APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:



Action Consent Information Discussion

SANTA CRUZ COUNTY  
**WORKFORCE**  
DEVELOPMENT

## A.2 Strategic Plan Update

<b>COMMITTEE:</b> Workforce Development Board	<b>MEETING DATE:</b> December 9, 2020
<b>STAFF NAME:</b> Andy Stone, WDB Director	

### SUMMARY:

On September 16, 2020 the WDB approved the WDB Director's Program Year (PY) 2020-21 Operational Plan which lays out the specific actions for the program year designed to ensure that the Strategic Plan's goals are met. The attached scorecard represents the PY 2020-21 outcomes for the approved goals and action steps.

Both the Strategic Plan and the WDB Director's Operational Plan incorporate the Strategic Goals referenced below.

#### Strategic Goals for Workforce Santa Cruz County

**Goal 1:** Increase effectiveness of local and regional workforce development system to better meet job seekers, business and community needs

**Goal 2:** Align workforce development strategies to support local economic development

**Goal 3:** Develop strategic relationships with educators, employers and community partners

Attachment(s)

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### **SUGGESTED MOTION: (if applicable)**

I move to accept the WDB Director's Operational Plan update for PY 20-21.

<b>COMMITTEE DATE</b>	<b>COMMITTEE APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:
<b>BOARD DATE</b>	<b>BOARD APPROVAL:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Other:

**A.2 Attachment - Workforce Development Board of Santa Cruz County  
STRATEGIC PLAN STATUS REPORT Program Year (PY) 2020-2021**

	<i>Status</i>	<i>2020-21 Operational Targets</i>	<i>YTD</i>
<p><b><u>Goal 1</u></b></p> <p><b>Increase effectiveness of local and regional workforce development system</b></p>	✓	<ul style="list-style-type: none"> <li>• Establish Racial Equity Goals for the WDB</li> <li>• Redesign WIOA Youth Program and provide presentation to WDB</li> <li>• Virtual Career Service Platform - Design and Launch</li> </ul>	<p>Seeking consultant to help establish equity goals</p> <p>Social Policy Research Associates has been selected to assist with Youth Program Redesign - WDB Presentation Scheduled for 4/1/21</p> <p>Career Services Website design out for bid now</p>
<p><b><u>Goal 2</u></b></p> <p><b>Align workforce development strategies to support local economic development</b></p>	✓	<ul style="list-style-type: none"> <li>• Report on COVID 19's impact on local businesses</li> <li>• Report on IT careers in hospitality and retail</li> <li>• Establish virtual hiring services for local employers</li> </ul>	<p>COVID Report Scheduled for 5/26/21 WDB Meeting</p> <p>Hospitality &amp; Retail IT Careers will be featured in State of the Workforce Report by 6/30/21</p> <p>Obtained Virtual Job Fair platform on 11/1/21</p>
<p><b><u>Goal 3</u></b></p> <p><b>Develop strategic relationships with educators, employers and community partners</b></p>	✓	<ul style="list-style-type: none"> <li>• Assist Second Harvest Food Bank with pandemic staffing needs</li> <li>• Hold Community Partner engagement meetings as part of local plan update</li> </ul>	<p>Providing Support to SHFB through WIOA Youth work experience program and through a Federal Dislocated Worker Grant with Monterey County</p> <p>Engagement meetings will be scheduled in early 2021</p>

✓ on track to meet planned target for the year

✗ not on track to meet planned target for the year