



## Executive Committee Meeting, Wednesday, February 4, 2026 @ 8:30 am Agenda

February 4, 2026 8:30am - 10:30am PST

Location: Workforce Santa Cruz County

500 Westridge Drive - Career Center Classroom, Watsonville, CA 95076

### 1. Call to Order / Welcome

8:30am

### 2. Non-agenda Public Comment

### 3. Chairperson's Report

### 4. Action Items (vote required):

a. Approval of the Minutes: November 5, 2025 Andy Stone

[Item 1\\_Attachment Draft Minutes 11.5.2025 Executive Comm.docx](#)

b. WIOA PY25/26 Contractor Local Program Monitoring Sara Paz-Nethercutt

[Action Item\\_WIOA PY25-26 Contractor Local Program Monitoring.docx](#)

[Attachment\\_draft GCC monitoring report 25 26\(1.9.2026\).pdf](#)

[Attachment\\_draft SCCOE monitoring report 25 26\(1.22.2026\).pdf](#)

c. WIOA Local Policies: New/Revised Sara Paz-Nethercutt

[Action Item \\_WIOA Local Policies-Revision.docx](#)

[Attachment\\_Local Policy Revision A.DW\\_Incentive\\_Policy 24-01rev.2\(1.2.2026\).pdf](#)

d. WDB Officer Nominating Committee PY26/27 Andy Stone

[Action Item\\_WDB Officer Nomination Committee 26.27.docx](#)

e. WDB Meeting Planning: March 4, 2026 Andy Stone

[Action Item\\_WDB March 4\\_Meeting Planning.docx](#)

## 5. Report Items (no vote required):

a. **Operational Plan and Continuous Improvement Plan Updates** Sara Paz-Nethercutt  
PY25/26 Andy Stone

 [Report Item\\_Plan Updates.docx](#)

 [Report Item\\_Attach 1\\_Operational Plan Report.docx](#)

 [Attach AJCC.Cert.Indicators.Cl.Plan PY2526-Q2 Status\(1.23.26\).docx](#)

b. **Staff Updates**

Andy Stone  
Brenda Diaz Rivas

 [Report Item\\_WDB.Staff.Updates.docx](#)

## 6. Adjournment

a. **Next Workforce Development Board Meeting: March 4, 2026  
@ 8:30 am**

**Location: 500 Westridge Dr. - Community Room, Watsonville**

b. **Next Executive Committee Meeting: April 29, 2026 @ 8:30  
am**

**Location: 500 Westridge Dr. - Career Center Classroom, Watsonville**

c. **Accessibility**

*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.*

END  
10:30am

**Workforce Development Board  
Executive Committee  
500 Westridge Dr, Watsonville CA 95076  
Wednesday, November 5, 2025 8:30 a.m.**

**The Chair called the meeting to order at 8:40 a.m., and a quorum was established. All participants attended in-person.**

**Committee Members in Attendance**

Adolfo, Tracey  
Ayyad Alia  
Morse, Rob  
Siegel, Carol  
Vereker, Dustin

500 Westridge Drive  
Watsonville, CA 95076  
(831) 763-8900

**MEMBERS:**

Rob Morse, Chair  
Monterey Bay Epic Adventures

Elyse Bartels, Vice Chair  
Business Owner

Alia Ayyad  
Center for Employment Training

Kristen Brown  
Santa Cruz Chamber of Commerce

MariaElena De La Garza  
Community Action Board

Marshall Delk  
West Coast Community Bank

Peter Detlefs  
County of Santa Cruz

Alma Diaz  
Employment Development Department

Daniel Dodge  
Cabrillo College Federation of Teachers

Felipe Hernandez  
Fourth District Supervisor

Carmen Herrera-Mansir  
El Pajaro CDC

Laura Holmquist-Gomez  
Five Star Catering

LeNae Liebetrau  
Department of Rehabilitation

Annabelle Rodriguez  
Cabrillo College

Francisco Rodriguez  
Monterey Bay Labor Council

Shaz Roth  
Pajaro Valley Chamber of Commerce  
and Agriculture

Katie Setzler  
Palo Alto Medical Foundation

Carol Siegel  
Santa Cruz Seaside Company

Bryan Shields  
Carpenters Local 646

Raymundo Sumano  
Sumano's Bakery

Casey Van Den Heuvel  
Sheet Metal Workers Local 104

Dustin Vereker  
Discretion Brewing

**DIRECTOR:**  
Andy Stone

**Guests**

None

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**Subject: Non-agenda Public Comment**

No public comments were received.

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**Subject: Chairperson's Report**

Chair Morse reported that equity and inclusion efforts are underway.

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**Subject: Action Items:**

**Item 1 – Approval of the August 27, 2025 Executive Meeting Minutes**

**Action:** It was moved to approve the August 27, 2025 Executive Committee meeting minutes.

**Status:** Motion to Approve: Carol Siegel  
Motion Seconded: Dustin Vereker  
Oppositions: None

Abstentions: None

**Committee Action:** Motion passed unanimously.

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**Item 2 – WIOA Program Services Procurement Results/PY2026/27 Award Recommendations**

It was reported that the Workforce Development Board (WDB) collaborated with the County's General Services Department (GSD) to conduct the RFP procurement process. Contracts allow for a one-year term with three optional one-year renewals, for a total of four possible years.

**Procurement Results Certified by GSD:**

- **Service Area 1 - Adult, Dislocated Worker Program Services:** Goodwill Central Coast
- **Service Area 2 - Youth Services:** Santa Cruz County Office of Education

**Action:** It was moved to recommend that the Full Workforce Development Board accept the award recommendations from the Procurement and authorize WDB Staff to enter into contract negotiations with the recommended vendors for PY 26-27.

**Status:** Motion to Approve: Carol Siegel  
Motion Seconded: Dustin Vereker  
Oppositions: None  
Abstentions: None

**Committee Action:** Motion passed unanimously.

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**Item 3 – Workforce Innovation & Opportunity Act Local Policies: New/Revised Fiscal Policies**

Revisions were proposed for the following program and fiscal policies:

1. **16-01, rev. 4 – Adult/Dislocated Worker (A/DW) Priority of Service and Wait List Policy**
  - Updates to implement Veterans Priority of Service per EDD Directive WSD24-15.
2. **Fiscal 25-01 – Property Management, Inventory Control, and Disposition Policy**
3. **Fiscal 25-02 – Payroll and Time Distribution Policy**
4. **Fiscal 25-03 – Audits and Audit Resolution Policy**

It was also noted that there were no findings during State monitoring.

**Action:** It was moved to recommend that the Full Workforce Development Board approve the WIOA revised local program services and fiscal policies, as drafted by staff.

**Status:** Motion to Approve: Carol Siegel  
Motion Seconded: Dustin Vereker  
Oppositions: None

Abstentions: None

**Committee Action:** Motion passed unanimously.

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#### **Item 4 – WDB December 3, 2025 Meeting Planning**

The Executive Committee agreed to include the following on the December 3, 2025 WDB meeting agenda:

- A panel of three board members
- A breakout session

**Action:** It was moved that the WDB staff include a panel of board members and a breakout session in the December 3, 2025 meeting agenda.

**Status:** Motion to Approve: Carol Siegel  
Motion Seconded: Alia Ayyad  
Oppositions: None  
Abstentions: None

**Committee Action:** Motion passed unanimously.

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#### **Item 5 – Plan Updates**

##### **1. Operational Plan Update:**

Progress was reviewed for the three strategic priorities:

1. **Job Quality & Economic Mobility:** increasing access to living-wage jobs.
2. **Employer & Small Business Engagement:** strengthening connections with local employers.
3. **Skills Gaps & Training Alignment:** ensuring training matches high-demand occupations.

##### **2. AJCC Continuous Improvement Plan 2025–2027 (Q4 Update):**

Available at: <https://bit.ly/3JnKj5C>

**Action:** None; report item only.

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#### **Item 6 – Workforce Development Board Staff Updates**

##### **WIOA Career Services Report – Presented by Sara Paz-Nethercutt:**

###### **1. Regional Equity and Recovery Partnerships (RERP):**

- Partnership grant concluded
- 30 Enrollees

###### **2. Prison to Employment (P2E) Grant:**

- Funding unchanged
- Board of Supervisors approved extension through next year

- Program expected to exceed enrollment goals

**3. Local WIOA Contractor Monitoring:**

- Monitoring activities are underway

**Community Engagement/Eligible Training Provider List (ETPL) – Reported by Brenda Diaz-Rivas:**

**1. The James Irvine Foundation - Public Workforce Capacity Grant**

- In-person showcase scheduled for January 2026
- James Irvine Foundation providing \$43,000 in support of Human Centered Design

**Action: None; report item only.**

**Meeting adjourned at 10:00 a.m.**

**Next Meetings:**      **Workforce Development Board**  
**December 3, 2025 @ 8:30 am**  
**Location: 500 Westridge Dr. – Community Room**

**Workforce Development Board – Executive Committee**  
**February 4, 2026 @ 8:30 am**  
**Location: 500 Westridge Dr. – Career Center Classroom**

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## Action Item: WIOA PY 25/26 Contractor Local Program Monitoring

(Action required) – Sara Paz-Nethercutt

### **Recommendation**

Recommend that the full Workforce Development Board accept the PY 25/26 Workforce Innovation and Opportunity Act (WIOA) local program monitoring reports as drafted by WDB staff.

### **Background**

WDB Staff monitored the following contracted services for program year 2025/2026 and drafted reports. Attached are the drafted reports:

1. Goodwill Central Coast (GCC)
2. Santa Cruz County Office of Education (SCCOE)

The monitoring includes the following:

- Contract Questionnaire: covers work environment, program and site accessibility, administrative requirements, staffing requirements, grievance, and program operations.
- Financial Questionnaire: covers fiscal management, program income, cost allocation, facilities and property, and audit.
- Program Operations: covers contractor specific operations, assessment, service delivery, and specific services.
- Case File Review: covers required WIOA service documentation of a sample percentage of randomly chosen participant files.
- Participant Questionnaire: asks about services and recommendations from the randomly chosen participants, services important to the customer, and overall satisfaction with services on a 1-10 scale.
- Financial Sampling: A fiscal sampling review was conducted by Ernesto Esparza and Misha MacColl, HSD Accountants for all programs. This is an annual review of program fiscal records.

### **Next Steps**

Monitoring reports will become *Final* upon approval by the Workforce Development Board at its March 4, 2026 meeting. WDB staff next steps include the following:

- Apply the internal protocols as developed. (GCC, SCCOE)
- Review during contract negotiations for PY 26/27 (GCC, SCCOE)
- Review at the next annual monitoring visit. (GCC, SCCOE)

### **Suggested motion**

I move to recommend to the full Workforce Development Board to accept the PY 25/26 local program monitoring reports as drafted by WDB staff.

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**Service Provider:** Goodwill Central Coast (GCC)

**Workforce Development Board Analyst:** Sara Paz-Nethercutt, WDB Sr. Analyst  
831.763.8756  
[Sara.Paz-Nethercutt@santacruzcounty.us](mailto:Sara.Paz-Nethercutt@santacruzcounty.us)

**Monitoring Dates:** Review November 3-7, 2025; overall monitoring period concluded November 10, 2025; A complete monitoring review was conducted via a hybrid model of in-person and remote platforms for participant interviews and case file reviews.

**Term of Contract:** July 1, 2025 through June 30, 2026

**Overview of Scope of Work**

Contractor is the designated service provider for Adult and Dislocated Worker Workforce Innovation and Opportunity Act (WIOA) programs in the Career Center (One-Stop). WIOA services are offered at the full-service, comprehensive career center located at 500 Westridge Drive in Watsonville. Contractor provides Universal Services to the public in the Watsonville Career Center Resource Room and at the affiliate career center located at the Employment Development Department (EDD) office in Capitola.

Contractor is responsible for providing comprehensive services and activities to participants as required under WIOA regulations. These activities include client outreach/recruitment, eligibility determination, case management, access to training scholarships, supportive services, workshops, employment, and follow-up services, as well as data entry and report preparation as required in the approved WIOA automated case management system. WIOA services are branded as services of Workforce Santa Cruz County, a proud partner of the America's Job Center of California™ Network.

Contractor provides eligible customers with scholarships for a full range of training services by establishing an Individual Training Account (ITA). Customers choose training providers from the State Eligible Training Provider List (ETPL) and from those providers who have entered into an agreement with the Santa Cruz WDB. Contractor also offers On-the-Job Training (OJT) and Transitional Jobs (TJ) in the menu of services to WIOA eligible participants and develops OJT/TJ contracts with employers to achieve placement, retention, wage replacement, and training credentials.

During 2025/2026, Contractor also provides program services for the Regional Equity and Recovery Partnership (RERP) and the Prison to Employment (P2E) grants, as referenced in the contract. The RERP grant concluded October 30, 2025.

Contractor uses the State CalJOBS system to register, enroll, and track the WIOA participants they serve and to provide the information needed to measure program outcomes.

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The reference to *Contractor* is hereby used interchangeably with *GCC* to mean the same entity throughout report.

**Finding(s):** Issues of non-compliance. There were zero (0) findings.

**Areas of Concern** Circumstances that may become a compliance issue if not addressed. There were four (4) areas of concern that were identified:

<b>Areas of Concern:</b>	<b>Recommended Internal Protocols):</b>
<ol style="list-style-type: none"><li>1. On-the-Job (OJT) Invoicing not matching OJT contract training plan for September 2025. [1006537225;1006472439] Note: This issue was resolved during the monitoring period.</li><li>2. Training proposals from Cabrillo College are a combination of several documents, including school calendar, course catalog, and emails from training provider making it, at times, difficult to ascertain easily the training begin/end dates and specifically the courses intended for the certificate or credential. Cabrillo archived Education Plans no longer in the case file for Cabrillo-WIOA participants. [See also Recommendation below for additional context.]</li><li>3. Supportive Services documented need was in a detailed case note in CalJOBS for three (3) participants who never received the service by the end of their WIOA participation.</li></ol> <p><b>Fiscal-related</b></p> <ol style="list-style-type: none"><li>4. Purchase Order (PO) Timing</li></ol> <p>Instances were noted where purchase orders were created on or after the related invoice date(s).</p> <p>Note: Costs reviewed appeared allowable and supported.</p>	<ol style="list-style-type: none"><li>1. It is recommended that Contractor develop internal protocols:<ul style="list-style-type: none"><li>o To ensure accurate monthly invoicing of OJT contracts. [Repeat Area of Concern PY24/25]</li><li>o To ensure consistent and uniform information, that contains the essential details, is obtained for all WIOA participants who chose Cabrillo as their training vendor.</li><li>o To ensure a case note is created with an explanation for the reason the Supportive Services was never provided despite the assessed documented need for service.</li><li>o To ensure POs are established prior to receiving and/or paying invoices to demonstrate clear procurement pre-approval and documentation, consistent with Uniform Guidance procurement and internal control requirements</li></ul></li></ol>

**Citation:** WDB local policy: WIOA Supportive Services Policy, 16-04, rev. 2; WIOA Local On-the-Job Contract; WSD20-10, WIOA Participant Reporting (4.8.2021); WSD22-15, WIOA Data Validation and Source Documentation (6.27.2023); (2 CFR§200.318(a), 2 CFR §200.318(i), and 2 CFR §200.303(a)).

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**Contractor Response:** Recommendations and actions requested are underway to avoid becoming a compliance issue.

**Next steps:**

- Develop, submit, and apply the internal protocols as outlined for Areas of Concern
- Review recommendations for development of internal protocols, if necessary.
- Review monitoring report during contract negotiations for PY 26/27 to determine whether to modify any contract language. Note: GCC has been awarded the PY 26/27 contract via a competitive procurement;
- Review overall monitoring at the next annual monitoring visit.

**Observations/Recommendations (No response necessary):**

1. It is recommended that Contractor review their process for situations when a participant completes the training program earlier than the initial proposal indicates, i.e TDI, participants have several proposals with varying end dates; staff should create a case note specifically when a participant completes the courses earlier than the date listed on the initial and subsequent modifications of the Individual Employment Plan (IEP) indicated.
2. It is recommended that Contractor create standard work for uploading all WIOA required documents in CalJOBS, i.e Documents folder: eligibility documents only; Activity Codes, relevant documents associated with 102, Initial Assessment; 205 Individual Employment Plan(s); 300, training proposals; Case notes: everything else.
3. It is recommended that Contractor develop an alternative process for obtaining a proposal for the WIOA participants interested in attending Cabrillo. Archived Education Plans (Ed Plan) are not always available timely to align with WIOA enrollment and participation due to required appointments with college counselors to obtain the Ed Plan.
4. Contractor commended for the work completed on the Regional Equity and Recovery Partnership (RERP) grant.

**Fiscal Related**

1. Travel documentation has improved; however, only a portion of reviewed travel claims included mileage maps. Please continue including mileage maps consistently and include training agendas when travel is for trainings/conferences (if applicable), to support allowability and documentation of travel purpose in line with Uniform Guidance travel cost documentation expectations (2 CFR §200.475(b)).
2. Purchase Orders (PO) – Tax Line / Tax-Exempt Notation  
For clearer reconciliation and consistency, consider adding tax lines (or a clear tax-exempt notation) on POs/invoices to align PO terms with the final invoiced/paid amounts and strengthen source documentation, consistent with Uniform Guidance financial management and documentation standards (2 CFR §200.302(b)).

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3. Policies & Procedures (P&P Tool)

It is recommended that Contractor use the Employment Development Department (EDD) P&P tool to verify procedures align with Uniform Guidance and include clear references where helpful to support future fiscal reviews or audits, consistent with written procedure and internal control expectations under 2 CFR §200.302(b)(6)–(7) and 2 CFR §200.303, and consistent with EDD guidance for WIOA subrecipients (WSD16-16).

**Contract Questionnaire:** Completed with GCC staff: Ivan Becerra, Program Manager and Claudia Cortes, Director of Mission Services.

**Financial Questionnaire:** Completed by Deanne Taylor, GCC, Controller.

**Administrative Questionnaire:** Completed by Ivan Becerra, GCC Program Manager.

**Entrance Conference** conducted with the following GCC staff: Gloria Baltazar, Grants Accountant; Ivan Becerra, Program Manager; Claudia Cortes, Director of Mission Services; Shelby Mason, Vice President Mission Services; Deanne Taylor, Controller; County Human Services Department Fiscal Staff: Emily Kenville, Accountant III, Ernesto Esparza, Accountant II, Misha MacColl, Accountant I and Workforce Development Board Staff: Elizabeth Gutierrez, Administrative Aide.

**Exit Conference** conducted with the following GCC staff: Gloria Baltazar, Grants Accountant; Ivan Becerra, Program Manager; Claudia Cortes, Director of Mission Services; County Human Services Department Fiscal Staff: Emily Kenville, Accountant III, Ernesto Esparza, Accountant II, Misha MacColl, Accountant I and Workforce Development Board Staff: Elizabeth Gutierrez, Administrative Aide, Andy Stone, Director.

**Planned verses Actual Performance/Expenditures:**

The program year objectives being reviewed is 25% of the contract period completed (July-September). All WIOA contract objectives are on target and there are no major concerns.

The RERP grant has been closed and expenditures and enrollments are listed below. P2E enrollments are expected to be completed by its' grant conclusion extension date of December 31,2026. Currently there is no cause for concern for the P2E grant.

The contractor has submitted invoices through the month of September 30, 2025 and is 17.5% expended in the WIOA career center services contract. The first three (3) months of the program year are equal to 25% of the program year [includes the months of July-September]. Contractor is underspent for this period.

**PROGRAM PERFORMANCE BASED OUTCOMES**

Program Year 25-26	Total	Adult	DW	RERP grant closed	P2E
Planned Number of NEW Training Enrollments	151	55	58	32	6

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Actual as of 9/30/25	74	30	8	30	6
<b>Percentage of Planned goal</b>	49%	54.5%	13.7%	93.7%	100%
Training Completions (certificates, OJT/TJs)	115	45	46	24	4
Actual as of 9/30/2025	22	7	6	8	1
<b>Percentage of Planned goal</b>	19%	15.5%	13%	33.3%	25%
Entered Employment	100	37	36	24	3
Actual as of 9/30/2025	9	3	3	2	1
<b>Percentage of Planned goal</b>	9%	8%	8%	8%	33%

**PROGRAM EXPENDITURES**

Program Year 25-26	Total	Adult	Dislocated Worker	Rapid Response	RERP grant closed	P2E
<b>Planned Operations Cost</b>	\$953,342	\$349,901	\$349,901	\$12,696	\$171,500	\$69,344
<b>Expended as of 9/30/2025 claims*</b>	\$228,948.48	\$69,725.88	\$69,000.49	\$0	\$87,021.07	\$6,201.04
Percent Expended	24%	19.9%	19.7%	0%	50.7%	8.9%

\*Contractor submitted claims through September 2025 (25% of the year); October claim due 11/30/2025, after the monitoring period concluded.

**File Review:** Fifteen (15) case files were randomly selected for file and service review. This included two (2) case files for the OJT program and two (2) for the P2E program.

Issues noted as *Areas of Concern* or *Recommendations/Observations* as appropriate. Six (6) were randomly selected for an interview.

**Data validation Issues: None.**

**Other Issues:**

- Documented need of Supportive Services on three (3) of the fifteen (15), however services were never provided:
  - i. Need assessed on 2.14.2025 completed training on 5.5.2025, never used service [779375194]
  - ii. Need assessed on 10.9.2025, completed training on 11.14.2025, never used service. [1002299237]
  - iii. Need assessed on 2.25.2025 completed training on 4.4.2025, never used service. [305444461];

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Data Change Request (DCR) program year history (7/1/25 to 9/30/25) was reviewed and of the eleven (11) DCRs submitted, errors were categorized as follows:

- Case manager error: two (2) 18% (human error)
- Collaboration/communication with Eligible Training Provider List (ETL) error: seven (7) 63.6% (missing certificates of completion)
- Collaboration/communication with participant error: zero (0) 0%
- Other: two (2) 18% (CalJOBS system limitations)

Note: of the eleven (11) errors, seven (7) [64%] were attributable to overall collaboration/communication errors with the training provider. ETPL Coordinator has been notified to search for ways to improve the communication between the training provider- case manager for obtaining the required completion information timely. It is recommended that contractor seek technical assistance training to avoid errors in the future.

**Participant-Employer Interview Results:** GCC staff were given a list of six (6) randomly selected participants for interviewing purposes. All six (6) participants were scheduled for an interview. All six (6) were scheduled for an interview, two (2) were unable to be reached despite several attempts. One (1) employer, Dientes, was interviewed. The results are:

**Satisfaction Scale** of 1- 10 with 1 being Very Dissatisfied and 10 being Very Satisfied. The average participant response was 6.6 for Adult/Dislocated Worker program services staff. Participants had the following to share:

- “I would have like to have had a more clear explanation of the process”.
- “Career Center was very busy and the waiting process for WIOA enrollment was long”.

The Dientes staff response was 8.0.

**WIOA Section 188 Nondiscrimination and Equal Opportunity:** Based on the review, there is continued compliance and there are no major concerns.

**Fiscal Sampling Review Results:**

A fiscal sampling review was conducted by Ernesto Esparza and Misha MacColl, HSD Accountants. Accounting records and systems; cost classification and appropriateness of charges, and allocation of staff salaries and benefits to the contract were reviewed. The monitoring included a review of a sample selection for the period of October 1, 2024, to September 30, 2025. As previously noted, there were no findings and areas of concern are so noted with a request for internal protocols to avoid findings in the future.

**Financial Questionnaire:** Based on the review, there is continued compliance and the areas of concern are so noted with a request for internal protocols to avoid findings in the future.

**Administrative Questionnaire:** Based on the review, there is continued compliance and there are no major concerns.

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**Contract Questionnaire:** Based on the review, the areas of concern are so noted with a request for internal protocols to avoid findings in the future.

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Andy Stone  
Director, Workforce Development Board  
Human Services Department

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Date

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**Service Provider:** Santa Cruz County Office of Education; WIOA Youth Services – Sueños Program

**Workforce Development Board Analyst:** Sara Paz-Nethercutt, WDB Sr. Analyst  
831.763.8756  
[Sara.Paz-Nethercutt@santacruzcounty.us](mailto:Sara.Paz-Nethercutt@santacruzcounty.us)

**Monitoring Dates:** Remote review November 17, 2025 – December 1, 2025; overall monitoring period concluded December 1, 2025; A complete monitoring review was conducted via a hybrid model of in-person and remote platforms for participant interviews and case file reviews.

**Term of Contract:** July 1, 2025 through June 30, 2026

**Overview of Scope of Work**

The Contractor provides outreach/recruitment, intake, assessment, registration, development of the Individual Service Strategy (ISS)/Career Plan, case management and referral to other contracted and non-contracted service providers as needed to fulfill the requirements of the WIOA Youth program. Contractor provides access to the fourteen (14) elements under the WIOA Youth program. Target Youth are defined by regulation as young people between the ages of 16-24 and meet the definition of in-school or out-of-school (OSY) with certain barriers. Local policy further dictates In-School Youth must reside in Santa Cruz South County (zip codes: 95076, 95077 and 95019) with a 5% dispensation for other potential ISY located in Santa Cruz County, pending funding availability. This residency requirement is not applied to the OSY who may reside anywhere in Santa Cruz County.

The goal of youth programs under the WIOA is: 1) to develop the work, career pathways, potential educational attainment, and opportunity for skills training in in-demand industries and occupations for young people in the County of Santa Cruz to increase access to jobs, job retention and earnings, and helping employers with skilled workers; 2) build a comprehensive, high quality coordinated youth workforce development system that prepares youth for successful futures.

**Finding(s):** Issues of non-compliance. There were zero (0) findings identified.

**Areas of Concern** Circumstances that may become a compliance issue if not addressed. There were two (2) areas of concern that were identified:

<b>Areas of Concern:</b>	<b>Recommended Internal Protocols):</b>
1. WIOA Supportive Services expenditures lack a detailed CalJOBS case note describing the need for the LiveScan and TB test.  Note: Issue was resolved during the monitoring.	1. It is recommended that Contractor develop internal protocols: <ul style="list-style-type: none"><li>o To ensure the documented need case note aligns with the information contained in the Individual Service Strategy. (ISS) The ISS is used to</li></ul>

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<p><b>Fiscal-related</b></p> <p>2. Time Study / Invoicing Support (After-the-Fact vs. Budgeted FTE)  Contractor uses monthly time studies to support allocation of costs between In-School Youth (ISY) and Out-of-School Youth (OSY) for billing purposes. For the sample reviewed, invoice allocations did not consistently appear to be tied back to after-the-fact time study support and/or actual payroll totals, creating a risk of over- or under-billing between cost objectives.</p>	<p>create a personalized educational and employment roadmap for the youth participant goals and the WIOA activities/services they need to achieve them.</p> <ul style="list-style-type: none"> <li>o To ensure WIOA charges are supported by records that reasonably reflect the work performed, Contractor should be documenting the WIOA time distribution method and implementing a periodic reconciliation/true-up to actual payroll and final time study results.</li> </ul>
<p><b>Citation:</b> WDB local policy: 19-02, Supportive Services Policy; WSD20-10, WIOA Participant Reporting (4.8.2021); WSD22-15, WIOA Data Validation and Source Documentation (6.27.2023); 2 C.F.R. § 200.430</p>	
<p style="text-align: center;"><b>Contractor response pending.</b></p>	

**Next steps:**

- Provide response to draft report by deadline to address the Areas of Concern; submit recommended internal protocols, as necessary.
- Develop, submit, and apply the internal protocols as outlined for Areas of Concern
- Review recommendations for development of internal protocols, if necessary.
- Review monitoring report during contract negotiations for PY 25/26 to determine whether to modify any contract language. Note: SCCOE has been awarded the PY 26/27 contract via a competitive procurement;
- Review overall monitoring at the next annual monitoring visit.

**Observations/ Recommendations (No response necessary):**

1. It is recommended that Contractor obtain and promote the latest WIOA brochure in the satellite America's Job Center of California (AJCC).
2. It is recommended that Contractor provide more detailed case notes for the Follow-up WIOA element. There are specific CalJOBS data entry fields available for youth who refuse services that were provided to the Contractor during the monitoring by the CalJOBS administrator.

**Fiscal-related**

3. Student Training Reimbursements – Supporting Documentation  
It is recommended that Contractor strengthen controls by consistently retaining additional proof (e.g., clearer itemized receipts and evidence of payment) when available. Student training reimbursement documentation reviewed appeared acceptable under SCCOE's process.

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**4. Signature Blocks vs. Actual Approval Practice**

It is recommended that Contractor align multiple signature line forms and signature practice to ensure approvals are clear and consistent with established policy where forms include multiple signature lines (e.g., 2-3 signers) but are routinely processed with fewer signatures.

**5. Student Payroll Documentation – Timesheet Version Control**

A student timesheet discrepancy was attributed to an overwritten version of the timesheet. Contractor provided corrected documentation. Contractor should continue to use version control and review checks to prevent similar issues.

**6. Policies & Procedures (P&P Tool) – Procedure Cross-References**

Contractor provided written fiscal procedures for the areas tested. Contractor should continue using the County's P&P review tool to confirm procedures remain aligned with Uniform Guidance and to add clear cross-references (where helpful) so key steps and approvals are easy to support during future monitoring or audits.

**Contract Questionnaire:** Completed with Bea Muñoz, Project Coordinator

**Financial Questionnaire:** Completed by Contractor staff: Patricia Muñoz, Project Coordinator; signed by Melissa Lopez, Director of Fiscal Services.

**Administrative Questionnaire:** Completed by Bea Muñoz, Sueños Project Coordinator.

**Entrance Conference** conducted with SCCOE staff: Patricia Muñoz, Project Coordinator and Beatriz Muñoz, Sueños Project Coordinator; Workforce Development Board Staff: Elizabeth Gutierrez, Administrative Aide; County Fiscal Staff Accountants, Ernesto Esparza and Misha MacColl.

**Exit Conference** conducted with SCCOE staff: Patricia Muñoz, Project Coordinator and Beatriz Muñoz, Sueños Project Coordinator; Workforce Development Board Staff: Elizabeth Gutierrez, Administrative Aide; County Fiscal Staff Accountants, Emily Kenville, Ernesto Esparza and Misha MacColl.

**Planned verses Actual Performance/Expenditures:**

The program year is 33.3% of the contract period completed (July- October). The In-School Youth (ISY) enrollment number is on track for this time of year. The Out-of-School (OSY) enrollment number is high for this time of year and Contractor may have to make enrollment adjustments very soon with a possible wait list for services.

OSY expenditures are not at the same pace as enrollments. Contractor has been made aware of the objective trajectory and will maintain regular oversight and provide updates to WDB staff at the monthly Contractor Service Integration (CSI) meetings.

The contractor has submitted invoices through the month of October 2025 and is 33% expended in the WIOA contract. The first four (4) months of the program year are equal to

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33% of the program year [includes the months of July- October]. Contractor is underspent for this time period, however, due to the amount, there is no reason for concern.

**PROGRAM PERFORMANCE BASED OUTCOMES**

Program Year 25-26	Total	ISY	OSY Waiver*	OSY
Carry-in to PY 25/26	60	14	10	36
Planned Number of <u>New</u> Enrollments	65	16	9	40
Actual as of <b>10/31/25</b>	26	4	4	18
<b>Percentage of Planned goal</b>	40%	25%	44.4%	45%

\*OSY waiver approved by EDD on 6/13/2025 allowing the decrease of the out-of-school youth (OSY) expenditure requirement from 75 percent to 50 percent for program year 2025/2026. Waiver approval will provide additional flexibility to increase in-school youth enrollments for those who meet the WIOA-defined youth barriers related to foster care, justice involved, and/or homelessness.

**PROGRAM EXPENDITURES**

Program Year 25-26	Total	In-School	Out of School
<b>Planned Operations Cost</b>	\$760,000	\$190,000	\$570,000
<b>Expended as of 10/31/2025 claims*</b>	\$178,134.57	\$51,918.34	\$126,217.23
Percent Expended	23.44%	27.3%	22.1%

\*Contractor submitted claims through October 30, 2025, 33% of the year expended

Program Year 25-26	TOTAL	In-School	Out of School
<b>WEX direct wages/incentives to youth</b>	\$225,000	\$56,250	\$168,750
<b>Expended as of 10/31/2025 claims*</b>	\$26,951.66	\$14,725.45	\$12,226.21
Percent Expended	11.9%	26%	7.2%

\* November invoice is due 12/31/2025

**File Review:** Fourteen (14) case files were randomly selected for file and service review.

- Direct data entry to CalJOBS, the state case management system, for tracking all WIOA eligibility and WIOA activities also contains uploading required documents to same portal. This effectively supports the local WDB paperless initiative and the elimination of case files.
- Case files contain very detailed case notes demonstrating the service delivered to each youth participant. Similarly, case managers enter CalJOBS activity codes each service identified in the youth Individual Service Strategy (ISS) and for each additional program element received. On average the youth case files reviewed had an average of nineteen (19) activities. Seven (7) of the fourteen (14) youth participated in over twenty (20) activities.

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**Data Change Request (DCR)** program year history (7/1/25 to 11/30/25) was reviewed and of the six (6) DCRs submitted the monitor determined:

- All six (6), 100% of the DCRs were identified as case manager error. WDB staff will provide technical assistance to provide necessary staff training and support for CalJOBS data entry.

**Participant-Employer Interview Results:** Of the fourteen (14) case files selected, seven (7) were randomly selected for an interview. Only six (6) of the seven (7) youth were scheduled for an interview, the remaining one (1) declined to be interviewed. The results are:

**Satisfaction Scale** of 1- 10 with 1 being Very Dissatisfied and 10 being Very Satisfied: The average youth program participant response was 8.2. Some of the feedback from youth participants includes the following:

- “The Sueños program is providing a positive impact on my life and my future goals”.
- “Participation in the program helps me learn and grow as a person”.

Three (3) work experience employers were randomly selected for an interview:

- SCCOE, Sequoia Schools & Childcare Center
- Pajaro Valley Loaves and Fishes
- Second Harvest Food Bank Santa Cruz

**WIOA Section 188 Nondiscrimination and Equal Opportunity:** Based on the review, there is continued compliance and there are no major concerns.

**Fiscal Sampling Review Results:**

A fiscal sampling review was conducted by Ernesto Esparza and Misha MacColl, HSD Accountants. They reviewed accounting records and systems; cash management and payroll systems; internal audit controls; cost classification and allocation systems. The monitoring included a review of a sample selection for the period of October 2024 to September 2025. There were some areas of concern found during the fiscal monitoring which are listed on page 2 of this report with requests for internal protocols to avoid findings in the future.

**Administrative Questionnaire:** Based on the review, there is continued compliance and there are no major concerns.

**Contract Questionnaire:** Based on the review there is continued compliance, and the areas of concern are so noted beginning on page 1 of this report with requests for internal protocols to avoid findings in the future.

**Financial Questionnaire:** Based on the review there is continued compliance, and the areas of concern are so noted beginning on page 2 of this report with requests for internal protocols to avoid findings in the future.

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Andy Stone  
Director, Workforce Development Board  
Human Services Department

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Date

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## **Action Item: WIOA Local Policies: New/Revised**

(Action required) – Sara Paz-Nethercutt

### **Recommendation**

Recommend that the full Workforce Development Board approve the Workforce Innovation and Opportunity Act (WIOA) local program services policy revision, as drafted by staff.

### **Background**

From time to time, Workforce Innovation and Opportunity Act (WIOA) local policies need to be updated. The following local program policy requires a revision:

1. 24-01, rev. 2, Adult/Dislocated Worker (A/DW) Incentive Policy [modifying the local benchmark success criteria (survey) for an incentive payment]. Attached.

### **Next Steps**

Policy revisions will go in effect upon approval by the Workforce Development Board at its March 4, 2026 meeting.

### **Suggested motion**

I move to recommend that the full Workforce Development Board approve the WIOA revised local program services policy revision as drafted by staff.



## **WIOA Adult/Dislocated Worker Incentive Policy**

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### **Policy Memorandum 24-01, rev. 2**

Date: Janaury 2, 2026

To: All Workforce Innovation & Opportunity Act (WIOA) Contracted Service Providers (WIOA service providers)

Purpose: To provide guidance to WIOA service providers providing incentive payments for eligible participants in the adult and dislocated worker programs.

Rescissions: WIOA Incentive Policy, 24-01, approved by the Workforce Development Board on October 30, 2024, revised on March 19, 2025.

References: WIOA Adult definition: WIOA sec. 3(2); WIOA Dislocated Worker definition: WIOA sec. 3(15); 20 CFR 680.900; Employment Development Department (EDD) Workforce Services Directive (WSD) 19-06, CalJOBS Activity Codes (December 27, 2019); EDD WSD 23-08, Stipends, and Incentive Payments (May 23, 2024)

### **Background:**

The Santa Cruz County Workforce Development Board (WDB) shall make available incentive payments to appropriate Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker participants. The Workforce Development Board ensures that:

- Criteria provided under this policy are necessary to encourage success and enable participants to be recognized for the completion and achievement of activities under Title I of WIOA.
- Provision of incentive payments under this policy is contingent upon the availability of WIOA funds.
- Additionally, at the discretion of the local Workforce Development Board this Policy is subject to change.

### **Policy:**

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

WIOA service provider may grant incentive award payments to eligible participants enrolled in the WIOA adults and dislocated worker programs. Incentive payments are intended to be used to encourage and motivate WIOA participants to reach specific goals to obtain positive performance. Incentive payments are considered awards and are used to encourage participants to complete training, remain in jobs, or for achievement in other program activities. Incentives may be given for a participant's achievement in work readiness skills, and /or entered employment, or occupational skills training, as identified in the Individual Employment Plan (IEP).

An incentive payment is a one-time payment to a WIOA participant for the successful completion in each benchmark.

## B. Benchmarks

WIOA service provider staff shall use the Incentive Claim form, a locally developed document to identify the activities and/or benchmarks tied to the specific incentive payment amount:

BENCHMARK	SUCCESS CRITERIA	DOCUMENTATION	AMOUNT
Work readiness skills: Initial Satisfaction survey completion	Incentive earned upon completion of an Initial Satisfaction survey provided to participant after the development of their Individual Employment Plan (CalJOBS activity 205)	✓ Initial Satisfaction Survey completion within 3 days from date administered (date of the IEP)	Maximum, one-time \$25 incentive
Training Completion, certificate attainment AND Customer Satisfaction Survey completion	Incentive earned upon completion of training (CalJOBS activity 300) AND completion of the Customer Satisfaction survey provided to participant	✓ Customer Satisfaction Survey completion; AND ✓ Certification of training achievement/completion; or training provider transcripts	Maximum, one-time \$50 incentive
Entered Employment	Incentive earned upon participant starting employment in the field in which they were trained; can be upon completion of the CalJOBS Job Search activity 125.	✓ Pay stub/statement with dates matching up with post-training completion	Maximum, one-time \$100 incentive
Follow-up, post exit Employment details at 2 <sup>nd</sup> quarter after exit	Incentive earned during follow-up, participants employed during the 2 <sup>nd</sup> quarter after program exit	✓ Pay stub/statement with matching dates to the 2 <sup>nd</sup> quarter after exit	Maximum, one-time \$50 incentive
Follow-up, post exit Employment details at 4 <sup>th</sup> quarter after exit	Incentive earned during follow-up, participants employed during the 4 <sup>th</sup> quarter after program exit	✓ Pay stub/statement with matching dates to the 4 <sup>th</sup> quarter after exit	Maximum, one-time \$50 incentive

- Work readiness skills are considered a set of skills and behaviors that are necessary for any job: timeliness, accountability, critical thinking, and problem solving. This benchmark is intended to demonstrate the participants thoroughly completing the written survey within a distinct time period communicating their opinions effectively.
- Entered Employment is considered securing an unsubsidized job.
- Follow-up, post-training employment is considered maintaining the unsubsidized job during the follow-up post training period quarters for 12-months.

**C. Exception to policy**

Under special circumstances, on a case-by-case basis and with proper justification, WIOA service providers could request an exception to this policy. WIOA service providers should submit a Policy Exception Memo (Attachment I) with the explanation and justification for the exception to the WDB Sr. Analyst, with a cc. to the WDB Director.

There will be a fiscal monitoring mechanism in place so as not to exceed the annual budgeted amount. WIOA service provider staff shall create a CalJOBS case note entry to justify any authorizations exceeding the policy amount.

**D. Contracted Service Provider Responsibilities**

WIOA service provider staff shall make participants aware upon enrollment and during multiple contact points of the potential to earn incentive payments for completion of benchmarks during their WIOA participation. WIOA service provider staff shall complete the *Incentive Claim form* and maintain the completed form and accompanying documentation for each benchmark in CalJOBS. Incentive payments must be tracked by the WIOA service provider, and all information and documentation of incentive payment eligibility are kept in the case file and made available for review by local, state, and federal monitors.

The WIOA service provider is responsible for creating the corresponding incentive payment activity codes and corresponding beginning and ending dates in CalJOBS:

- CalJOBS Activity Code: Supportive Services: Incentives/Bonuses 183

Incentive payment data entry date (or date range) must match the backup documentation for the benchmark(s) used to earn the payment.

WIOA service provider staff shall create a CalJOBS case note entry to explain/document the incentive payments earned and justify any authorizations exceeding the policy amount.

Upon participant completion of the incentive benchmark, WIOA service provider staff shall create the Advanced Individual Fund Tracking (AIFT) obligation for the voucher to be paid directly to the participant. Additionally, immediately after creating the AIFT voucher, WIOA service provider staff shall send the participant a "congratulatory" message that includes the following information: *Your incentive payment may be taxable and present future tax implications. It could also impact any public benefits you are receiving as unearned income. Please consult with public benefits case manager for further details.*

Incentive payments initiated in AIFT, through County Fiscal may take between 6-8 weeks for the disbursement to be mailed to the participant. WIOA service provider may create a system that allows incentive payments to be made in a more efficient and expeditious way with WDB Director approval.

WIOA service provider may develop a revised payment plan (for inclusion on the incentive form) and obtain WDB or its designee approval to changes in the specific accomplishments used as benchmarks for payment attainment.

Failure to comply with the requirements may result in the service provider being placed on a corrective action and/or incur disallowed costs.

**E. Availability of Funding**

Participation in the WIOA program does not automatically entitle the participant to the incentive award payment but rather should be an award for achievements of certain benchmarks outlined on the incentive claim form.

It is expected that the availability of funds will fluctuate during the program year as participant benchmarks are attained. WDB Staff will notify the contracted service providers of the annual allocation. The annual incentive budget will be tracked so as not to exceed the allocation. The WIOA Adult/Dislocated Worker program services are ultimately contingent upon the availability of Federal funds and continued Federal authorization.

**Action:** All WIOA Adult and Dislocated Worker service providers shall comply with the WIOA Adult and Dislocated Worker Incentive policy. This policy memorandum is on-going and effective immediately for WIOA participants enrolled after July 1, 2024.

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

**Attachments:**

- I. Exception Memo
- II. Incentive Claim form

This policy approved by: Workforce Development Board, October 30, 2024; revised March 19, 2025.

## **POLICY EXCEPTION MEMO**

DATE:

TO: Workforce Development Board Director:

FROM: WIOA Service Provider:

SUBJECT:  Exception to ITA Limit Policy  
 Exception to Supportive Service Limit  
 Exception to WIOA A/DW Policy:  
 Exception to WIOA Youth Policy:

Participant last name, first initial: State ID#:

Vocational Goal:

Explanation:

Labor market demand  Hardship of individual:  
 Other: *Explain in comment section below*

Comments:

WIOA service provider supervisor:

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Authorized Signature

Workforce Development Board Staff Approval:  Yes  No: *Explain in comment section below*

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WDB Director and/or Designee Signature

Comments:

Return original to sender for participant's case file.

Rev. 11/1/2022

## **WIOA Adult/Dislocated Worker Incentive Policy- Incentive Claim Form**

This claim form authorizes incentive payments under the Workforce Innovation and Opportunity Act. Complete form for each incentive payment earned.

Participant Name:	Last 4 SSN:
Address:	City/Zip:
Funding Stream: <input type="checkbox"/> ADULT <input type="checkbox"/> DISLOCATED WORKER	

<b>BENCHMARK</b>		<b>AMOUNT/ Date Earned</b>	<b>Documentation</b>	<b>Incentive Authorization</b>
<b>1</b>	Work readiness skills; <i>Initial Satisfaction Survey</i> completion	\$25 incentive [ ] Date	<input type="checkbox"/> Survey completion	<input type="checkbox"/> Case Manager Authorization: [ ] date: CalJOBS <input type="checkbox"/> Activity Code 183 <input type="checkbox"/> Incentive form; AIFT, date:  <input type="checkbox"/> Case Note: date: [ ]
<b>2</b>	Training Completion, certificate attainment AND <i>Customer Satisfaction Survey</i> completion	\$50 incentive [ ] Date	<input type="checkbox"/> Certificate of completion <input type="checkbox"/> Training Provider transcripts <input type="checkbox"/> Survey completion	<input type="checkbox"/> Case Manager Authorization: [ ] date: CalJOBS <input type="checkbox"/> Activity Code 183 <input type="checkbox"/> Incentive form; AIFT, date:  <input type="checkbox"/> Case Note: date: [ ]
<b>3</b>	Entered Employment	\$100 incentive [ ] Date	<input type="checkbox"/> Employment Job Offer Letter <input type="checkbox"/> Pay stub/statement date must match post-training completion <input type="checkbox"/> Other: [ ] Please specify	<input type="checkbox"/> Case Manager Authorization: [ ] date: CalJOBS <input type="checkbox"/> Activity Code 183 <input type="checkbox"/> Incentive form; AIFT, date:  <input type="checkbox"/> Case Note: date: [ ]
<b>4</b>	Follow-up, post exit Employment details at 2 <sup>nd</sup> quarter after exit	\$50 incentive [ ] Date	<input type="checkbox"/> Pay stub/statement; dates must match the 2 <sup>nd</sup> quarter after exit	<input type="checkbox"/> Case Manager Authorization: [ ] date: CalJOBS <input type="checkbox"/> Activity Code F19 <input type="checkbox"/> Incentive form; AIFT, date:  <input type="checkbox"/> Case Note: date: [ ]
<b>5</b>	Follow-up, post exit Employment details at 4 <sup>th</sup> quarter after exit	\$50 incentive [ ] Date	<input type="checkbox"/> Pay stub/statement; dates must match the 4 <sup>th</sup> quarter after exit	<input type="checkbox"/> Case Manager Authorization: [ ] date: CalJOBS <input type="checkbox"/> Activity Code F19 <input type="checkbox"/> Incentive form; AIFT, date:  <input type="checkbox"/> Case Note: date: [ ]
<b>TOTAL AUTHORIZED/EARNED INCENTIVE PAYMENT:</b>				\$ [ ]

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## Action Item: WDB Officer Nominating Committee PY 26/27

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(Action required) – Andy Stone

### **Recommendation**

Appoint a nominating committee to recommend a slate of WDB Officer Candidates for PY 2026/2027 for consideration by the Workforce Development Board (WDB).

### **Background**

Each year, WDB's Nominating Committee recommends a slate of officers to fill the Board's elected leadership positions for the upcoming program year.

The current officers for Program Year 2025-26 (July 1, 2025 through June 30, 2026) are: Chair – Rob Morse; Vice Chair – Elyse Destout; Tracey Adolfo; Alia Ayyad; Carol Siegel; Dustin Vereker.

The WDB has a Nominating Committee process which calls for its members to be appointed by the Executive Committee and Workforce Development Board. The composition of the Nominating Committee may include the following listed below:

- The immediate past Chair, and one member from the Executive Committee.
- Two at-large members from the WDB membership.
- At least one member from the prior year's Nominating Committee membership.

Last years' Nominating Committee consisted of the following WDB members: Carol Siegel, Marshall Delk, Maria Elena De La Garza, and Dustin Vereker

The Nominating Committee shall return to this committee's April 29, 2026 meeting with a slate of candidates. Then, from the written Nominating Process:

*"Executive Committee presents recommended slate of Officers to the Board plus all other nominations before the WDB at the May Board meeting and recommends that nominations be closed. The WDB then votes on a closed written ballot for any contested positions. For positions that are uncontested, a voice vote may be taken. If there are no contested positions the slate may be voted upon in its entirety as a single vote".*

### **Next Steps**

Establish a nominating committee to recommend a proposed slate of WDB Officer Candidates for Year 2026-27 (July 1, 2026 through June 30, 2027) who will be presented for final appointment at the May 20, 2026 WDB meeting. Changes and additional nominations may be made from the floor.

### **Suggested motion**

I move to form a WDB Officer Nominating Committee and recommend a Slate of Candidates for Election by WDB at its May 20, 2026 meeting.

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## **Action Item: WDB March 4, 2026 Meeting Planning**

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(Action required) - Andy Stone

### **Background**

At this meeting, the Executive Committee will consider if it would like to add any additional agenda items to the March 4, 2026 WDB Full Board meeting agenda.

### **Suggested motion**

I move to direct that the WDB staff include the following items in the March 4, 2026 WDB meeting agenda.

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## **Report Item: Plan Updates**

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(No vote required) – Andy Stone

### **Background**

#### **1. Operational Plan Update:**

The Workforce Development Board conducted a comprehensive strategic planning process in 2025, including community engagement, surveys, and labor market analysis. At its April 16, 2025, meeting, the Workforce Development Board conducted a prioritization exercise to identify key areas for focus. The Board identified three strategic priorities:

1. **Job Quality & Economic Mobility:** increasing access to living-wage jobs.
2. **Employer & Small Business Engagement:** strengthening connections with local employers.
3. **Skills Gaps & Training Alignment:** ensuring training matches high-demand occupations.

At the September 24, 2025, Workforce Development Board meeting, direction was provided to inform the strategic plan activities and operational goals for the current Program Year. The attached PY 2025–26 Operational Plan Report outlines our progress with meeting these goals.

#### **2. AJCC Continuous Improvement Plan 2025-2027, Q2 Update**

### **Next Steps**

The WDB Director will report on the Plans' progress at each Workforce Development Board meeting.

**Item 5 Attachment 1 - Workforce Development Board of Santa Cruz County  
OPERATIONAL PLAN STATUS REPORT Program Year (PY) 2025-2026**

	<b>2025-26 Goals &amp; Progress</b>	<b>2025-26 Activities</b>
<p><b>Priority 1:</b> <b>Job Quality and Economic Mobility</b></p> <p><b>2030 Goal:</b> Thirty percent (30%) of all WDB assisted placements meet or exceed the county living wage.</p> <p>Champion: Sara Paz-Nethercutt</p>	<p><b>2025-26 Goal:</b></p> <ul style="list-style-type: none"> <li>Sixteen percent (16%) of placements meet the living wage standard (\$38.99/hr).</li> </ul> <p><b>Progress:</b> Annual Work Plan created; Outreach materials, resources and promotions in progress.</p>	<ul style="list-style-type: none"> <li>✓ Make Living Wage Target Visible</li> <li>✓ Promote Living-Wage Job Opportunities.</li> <li>✓ Build Career Ladders That Result in Living Wage Jobs</li> </ul>
<p><b>Priority 2:</b> <b>Employer and Small Business Engagement</b></p> <p><b>2030 Goal:</b> Two industry sector partnerships and deliver value-added services to at least 500 unique businesses by 2030.</p> <p>Champion: Andy Stone</p>	<p><b>2025-26 Goal:</b></p> <ul style="list-style-type: none"> <li>Maintain active healthcare sector council.</li> <li>Deliver value-added services to at least 75 businesses.</li> </ul> <p><b>Progress:</b> Business Services Manager position is vacant. Established CRM to maintain outreach efforts and connected with 10/75 businesses to date.</p>	<ul style="list-style-type: none"> <li>✗ Identify Host an Industry Sector Roundtable (Hospitality Focus)</li> <li>✓ Setup a Customer Relationship Management (CRM) system to track business engagement and establish Outreach Calendar</li> <li>✓ Identify Develop a Business Services Toolkit</li> </ul>
<p><b>Priority 3:</b> <b>Skills Gaps and Training Alignment</b></p> <p><b>2030 Goal:</b> Fifty percent of training enrollments support the top 10 high demand occupations by 2030.</p> <p>Champion: Andy Stone</p>	<p><b>2025-26 Goal:</b></p> <ul style="list-style-type: none"> <li>Forty percent of training enrollments support the top 10 high demand occupations.</li> </ul> <p><b>Progress:</b> WDB approved Top 10 Local Occupations. Identifying grant opportunities for short-term training and bridge programs.</p>	<ul style="list-style-type: none"> <li>✓ Eliminate Barriers to Training Success by Expanding Support Services and Creating Bridge Programs</li> <li>✓ Draft Publish Annual Labor Market Snapshot Featuring Board's Top 10 Occupations</li> <li>✓ Proactively Identify and Add Training Programs for Top 10 Local Occupations.</li> </ul>

✓ on track to meet planned target for the year

✗ not on track to meet planned target for the year

**County of Santa Cruz AJCCs**  
**Certification Indicator Assessment**  
**Continuous Improvement Plan 2025-2027, Status: 7.1.2025-12.31.2025**

Indicator	Continuous Improvement Goals and Recommendations	Target Action Items	PY 2025 Status/Target Completion Date
<p>1. The AJCC ensures <b>universal access</b>, with an emphasis on individuals with barriers to employment.</p> <p style="text-align: center;"><input checked="" type="checkbox"/></p>	<p><b>Comprehensive:</b></p> <ul style="list-style-type: none"> <li>Promote the "Workforce Santa Cruz" branding (logo) with the America's Job Center of California (AJCC) branding (logo) at the new career center location (e.g., pop-up banners, posters, and marketing materials).</li> <li>Obtain (County/DOR) assistance in creating flexible accessible AJCC site space for people with disabilities.</li> <li>Review program design to ensure procedures and practices reduce unnecessary administrative barriers to serving customers seeking employment and training services. (TEGL10-23).</li> <li>Encourage customers to use the "Comment Card" for resource room continuous improvement feedback immediately after receiving center services.</li> </ul>	<ul style="list-style-type: none"> <li><b>Review current marketing material and update. Submit to WDB to review and approve in PY24/25</b></li> <li>Create flexible accessible space for people with disabilities at AJCC comprehensive site</li> <li>Collaborate with other local area AJCCs to compare their policies and procedures to help identify possible improvements in Santa Cruz County.</li> <li>Review and educate all AJCC staff on comment card parameters to enable them to be able to encourage customers to use the comment cards for all types of feedback; Track comments under GCC KPIs.</li> </ul>	<ul style="list-style-type: none"> <li>WIOA orientation video – English version complete/posted to workforce website. <b>Spanish version pending, expected completion by PY25/26 Q3.</b></li> <li>Accessible space created- goal completed</li> <li>Collaboration on May 6, 2025 with Monterey WDB staff; GCC to explore SPOC for partner referrals concept at future OSO meeting.</li> <li>Staff trained on use of comment cards and are tracking responses under the KPIs.</li> </ul>
	<p><b>Sueños:</b></p> <ul style="list-style-type: none"> <li>Continue to work on updating the local assistive device list.</li> </ul>	<ul style="list-style-type: none"> <li><b>Review AJCC assistive devices list, specifically for the specialized AJCC and update as necessary.</b></li> </ul>	<ul style="list-style-type: none"> <li>Local Assistive device list complete; posted to DropBox.</li> </ul>
	<p><b>Comprehensive, Sueños:</b></p> <ul style="list-style-type: none"> <li>Provide AJCC staff training for working with diverse customers, including individuals with disabilities, cultural difference, and individuals with barriers to employment; expand equal access to community for in-person and virtual services.</li> <li>Develop a written limited English proficiency local plan which lists the criteria already in practice</li> <li>Provide human centered design (HCD) training for staff to utilize the principles within their AJCC and overall program design improvements; develop changes to services and program design, when necessary</li> <li>Continue to expand the reach of in-person and virtual services with CBOs, partners, and libraries.</li> </ul>	<ul style="list-style-type: none"> <li><b>Gather staff input on what specific training is needed; Schedule and hold at least one training by PY2024-25, Q4.</b></li> <li><b>WDB staff to take the lead on establishing a Limited English Proficiency (LEP) Plan by PY24/25, Q4</b></li> <li><b>WDB staff will issue a Procurement to find HCD trainer for WIOA contracted service providers.</b></li> <li>Continue to use the partner calendar to promote and coordinate monthly services; New Community Engagement Coordinator to explore expanding partnership with new library branches; refine/enhance online/virtual orientation, workshops, and tutoring.</li> </ul>	<ul style="list-style-type: none"> <li>Training calendar for PY25/26 currently underway; List of possible training topics has been created for 2025-26</li> <li>LEP plan in development.</li> <li>WDB procured <i>Civic Makers</i> for PY25/26 HCD training; intro course offered by Trainer Virginia Hamilton August 7/8, 2025;</li> <li>Partner calendar being promoted; community engagement partnerships in development</li> </ul>

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<p>2. The AJCC actively supports the One-Stop system through effective partnerships.</p> <p style="text-align: center;"><input checked="" type="checkbox"/></p>	<p><b>Comprehensive:</b></p> <ul style="list-style-type: none"> <li>Assign staff (GCC Community Engagement Specialist) to update the Integrated Service Delivery Guide (ISDG) to be used by AJCC staff partner for program services orientation and overall guide to services.</li> <li>Create a WIOA partner poster and/or partner resource board at the comprehensive AJCC site to market the various partner services.</li> </ul> <p><b>Sueños:</b></p> <ul style="list-style-type: none"> <li>Update the Integrated Service Delivery Guide (ISDG) to be used by AJCC staff partner for program services orientation and overall guide to services.</li> </ul> <p><b>Comprehensive; Sueños:</b></p> <ul style="list-style-type: none"> <li>Develop opportunities for WIOA partners to build effective partnerships and continue learning about local programs useful for workforce customers; for example, Community Engagement staff could resume Workforce Learning Collaborative, partner round table meetings or something with similar purpose.</li> <li>Develop a more robust “resource” page on the workforcescc.com website for staff and public to access for community and partner referrals.</li> </ul>	<ul style="list-style-type: none"> <li>WIOA Contracted Service Provider (GCC) designated staff will maintain the Integrated Service Delivery Guide between partners; share the updated ISDG when necessary.</li> <li>Community Engagement Coordinator will be assigned to work on developing WIOA partner board in AJCC.</li> </ul>	<ul style="list-style-type: none"> <li>Updated ISDG complete; to be updated quarterly.</li> <li>Created Google folder for partner access.</li> <li><b>WIOA partner board pending; expected completion by PY25/26 Q4.</b></li> </ul> <ul style="list-style-type: none"> <li>Updated ISDG complete; to be updated quarterly.</li> <li>Created Google folder for partner access.</li> </ul> <ul style="list-style-type: none"> <li><b>Roundtable Partner Meeting pending; expected scheduling by PY25/26 Q3.</b></li> <li>Workforce website improvements completed; reviewed for ongoing updates.</li> </ul>
<p>3. The AJCC provides integrated, customer-centered services.</p> <p style="text-align: center;"><input checked="" type="checkbox"/></p>	<p><b>Comprehensive:</b></p> <ul style="list-style-type: none"> <li>Use Lean continuous process improvement methodology to improve the customer-centered program design at the new 500 Westridge building.</li> <li>Develop customer flow strategy for Employment Development Department (EDD) co-location move to 500 Westridge.</li> <li>Provide WIOA overview training to co-located County staff to improve the integrated customer flow; encourage community engagement staff from the WDB and WIOA contracted service provider to collaborate on aligning and integrating the delivery of partner program services.</li> <li>Work on identifying/integrating/coordinate co-location, cross information, and direct access opportunities for new 500 Westridge site.</li> </ul>	<ul style="list-style-type: none"> <li>Collaborate with other local area AJCCs to compare their policies and procedures to help identify possible improvements in Santa Cruz County.</li> <li>EDD to collaborate with WDB staff on creating a customer flow once co-location date is planned.</li> <li><b>Goodwill will coordinate with county staff to provide 500W onsite (co-located) staff with training through the OSO and Workforce Learning Collaborative meetings.</b></li> <li><b>Use Roundtable and OSO meetings to identify /integrate/coordinate services at new 500W site. Use meetings as an opportunity to share available resources at the new 500W site.</b></li> </ul>	<ul style="list-style-type: none"> <li>Collaboration on May 6, 2025 with Monterey WDB staff; GCC to explore SPOC for partner referrals concept at future OSO meeting.</li> <li><b>WIOA and EDD co-location @ 500 W pending.</b></li> <li><b>Goodwill is coordinating with WDB staff to establish a training date for TANF staff at 500 W to learn about WIOA services.</b></li> <li>On-going. New room reservation form has been implemented for partner use of meeting rooms.</li> </ul>

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	<p><b>Sueños:</b></p> <ul style="list-style-type: none"> <li>Standardize the way in which AJCC Sueños staff routinely identify themselves as Workforce Santa Cruz County staff instead of Santa Cruz County Office of Education (COE) staff.</li> </ul>	<ul style="list-style-type: none"> <li>Staff to create branding strategy for standardizing <b>Workforce Santa Cruz County</b> to include: Custom Virtual logo/background and train staff on introducing themselves as <b>Workforce Santa Cruz County</b> staff.</li> </ul>	<ul style="list-style-type: none"> <li><b>Workforce Santa Cruz County</b> branding strategy included development of a virtual background with the WFSCC logo for Sueños staff and promotion of identifying as WFSCC staff has been completed.</li> </ul>
	<p><b>Comprehensive; Sueños:</b></p> <ul style="list-style-type: none"> <li>Review the WIOA Partner Memorandum of Understanding (MOU) with AJCC staff, on an annual basis, or as needed, for the integrated customer flow.</li> <li>Offer/Arrange staff training for providing excellent customer service.</li> </ul>	<ul style="list-style-type: none"> <li>Annually, Contracted Service Providers and OSO will review the WIOA mandated MOU with staff and partners respectively (by end of Q2)</li> <li>Annual Training Plan will be created to include: <i>Providing Excellent Customer Service</i>; Contractors and WDB to evaluate their respective budgets for offering the training to staff and partners.</li> </ul>	<ul style="list-style-type: none"> <li>2025 MOU renewal completed; Annual review of MOU conducted by Sueños and Goodwill; embedded in their onboarding process.</li> <li>Customer Service training was provided June 25, 2025.</li> </ul>
<p>4. The AJCC is an <b>on-ramp for skill development and attaining industry-recognized credentials</b> that meet the needs of targeted regional sectors and pathways.</p> <p style="text-align: center;"><input checked="" type="checkbox"/></p>	<p><b>Comprehensive:</b></p> <ul style="list-style-type: none"> <li>Continue to request and obtain Jobs EQ Reports for occupations in high demand to assist with helping customers navigate career pathways.</li> <li>Implement a tracking mechanism for training and employment outcomes, e.g., on the Lean Daily Management Board (DMB) to promote and see the value of their contribution to these measures.</li> </ul>	<ul style="list-style-type: none"> <li>WDB Staff (Admin Aide) to provide monthly JobsEQ reports for use in the AJCC.</li> <li><b>WIOA Contracted Service Provider (GCC) to use the weekly case management board (Lean DMB) review to track training and employment outcomes.</b></li> </ul>	<ul style="list-style-type: none"> <li>On-going – reports provided by WDB Staff.</li> <li>On-going – Lean DMB implemented and in use.</li> </ul>
	<p><b>Sueños:</b></p> <ul style="list-style-type: none"> <li>Implement a local Individual Training Account (ITA) policy for youth training scholarships.</li> <li>Establish staff training benchmarks to include attending specific training for effective case management, navigating career pathways and best practices for supporting customer successful completion of education and training programs.</li> </ul>	<ul style="list-style-type: none"> <li><b>Local ITA policy was board approved PY 24/25 Q2; WDB Staff to train Sueños on ITAs by end of PY24/25, Q3; Sueños to implement ITA policy by end of PY24/25.</b></li> <li>By PY 25/26, Sueños will establish Employment Specialist/Career Coaching Competencies, consulting with GCC for best practices.</li> </ul>	<ul style="list-style-type: none"> <li>ITA Policy Training occurred in January 2025; Sueños has implemented the policy (pending enrollments).</li> <li><b>Employment Specialist/Career Coaching Competencies in development, pending filling vacant positions; expected completion by PY25/26 Q4.</b></li> </ul>
	<p><b>Comprehensive; Sueños:</b></p> <ul style="list-style-type: none"> <li>Develop a strategy for appropriate referrals from the Adult/Dislocated Worker program to the WIOA Youth program for individuals between the ages of 18-24 for possible co-enrollments in the WIOA Youth program.</li> </ul>	<ul style="list-style-type: none"> <li><b>Using Lean methodology, WIOA contracted services providers (Goodwill and Sueños) will meet by the end of PY24/25, Q2 to initiate discussion on referral process.</b></li> </ul>	<ul style="list-style-type: none"> <li>Sueños and Goodwill have developed a process, including sharing a worksheet, for tracking referrals/ co-enrollments.</li> </ul>

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<p>5. The AJCC actively engages industry and labor and supports regional sector strategies through an <b>integrated business service strategy</b> that focuses on quality jobs.</p> <p style="text-align: center;"><input checked="" type="checkbox"/></p>	<p><b>Comprehensive:</b></p> <ul style="list-style-type: none"> <li>• Develop a business services strategy that includes the following: <ul style="list-style-type: none"> <li>◦ Creating a local list of employers offering entry level and high-quality jobs for customers and participants that could be used for <i>On-the-Job</i> (OJTs) and <i>Transitional Jobs</i> (TJs) placements.</li> <li>◦ Refining current <i>Business Services Employer Feedback Procedure</i> for a consistent system for seeking employer feedback on all delivery of WIOA services; refining current employer survey and improving response rate.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>WDB Staff, Business Services Manager (BSM) to lead discussion on strategies for collaborating and sharing a list of employers who are offering unsubsidized employment, OJT and TJ opportunities. See below*</b></li> <li>• <b>BSM to lead discussion on refining <i>WDB Business Services Employer Feedback Procedure</i>, to include details and roles for survey distribution, and improving response rate.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Employer database established;</li> <li>• BSM has survey available on a Google form; Established workforce licenses with LaunchPad Careers, Inc. for improved employer/business engagement</li> </ul>
	<p><b>Sueños:</b></p> <ul style="list-style-type: none"> <li>• Consider separating the youth WEX progress questions from the employer satisfaction questions on the WIOA Youth survey. Currently one "survey" is used to obtain all information from the WEX employer. Business Services Manager could have purview over all the employer satisfaction surveys providing data points to contracted service providers for program services improvements. [Note: For OJT/TJs the employer is provided a monthly participant progress report].</li> <li>• Create a business services written strategy that includes the following: <ul style="list-style-type: none"> <li>◦ Eliminating repeat requests for employer feedback and capturing employer opinions by one workforce entity (contractor or WDB staff) for continuous program service improvements</li> <li>◦ Creating a local list of employers offering entry level and high-quality jobs for customers</li> <li>◦ Increasing partnerships with industry leaders, workforce professionals, education and training providers that will increase WEX, training, Career Cluster Academy panelists, job shadowing and employment opportunities for customers.</li> <li>◦ Integrating business service manager employer contacts with WEX specialist contacts to minimize redundant employer contacts and eliminate WEX specialists unsolicited calls to businesses to offer WEX placements.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• BSM to lead discussion on refining <i>WDB Business Services Employer Feedback Procedure</i> to include details and roles for survey coordination; Sueños to review survey contents and consider separating the WEX participant progress questions from the WEX employer satisfaction survey.</li> <li>• <b>BSM to lead discussion on creating business services strategies that are unique to Sueños program needs including:</b> <ul style="list-style-type: none"> <li>◦ Creating a list of industry leaders and professionals for Career Cluster Academy panelists, job shadowing and other WIOA Youth program elements as <b>related to business services</b></li> <li>◦ <b>Coordinating outreach efforts with Sueños WEX specialist staff to reduce redundancy and See below*</b></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• BSM and Sueños have discussed refining <i>WDB Business Services Employer Feedback Procedure</i>. After review of WEX employer survey, Sueños plans to keep as is.</li> <li>• On-going – BSM is working with WEX specialist staff; shared database of available industry leaders. Staff have been putting in updates after BSM makes the first contact or if they initiate contact with the employer.</li> </ul>

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	<p><b>Comprehensive; Sueños:</b></p> <ul style="list-style-type: none"> <li>Strengthen relationship with Business Services Manager to increase connections with employment opportunities in local high demand occupations (see below for strategies)</li> <li>Develop a business services strategy that includes the following: <ul style="list-style-type: none"> <li>Training AJCC staff on connecting labor market conditions, regional economy, high demand occupations, sector strategies, and career pathways to promote quality jobs (e.g. annual state of the workforce; quarterly economy update).</li> <li>Building AJCC staff awareness of the local business services available (other than Rapid Response), including high road partnership.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>*BSM to lead discussion to develop a business services strategy that includes: <ul style="list-style-type: none"> <li>Method/process for providing WEX, OJT/TJ and unsubsidized employment opportunities to staff to share with WIOA participants;</li> <li>Method/process for building staff awareness on local business services available and industry sector partnerships;</li> <li>Plan for training staff on State of the Workforce, including applying the local labor market economy, sector strategies, and career pathways information to case manage WIOA participants.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>On-going – discussions at bimonthly Employer Services meetings.</li> <li>On-going – discussions at bimonthly Employer Services meetings.</li> <li>BSM provided a training at the Workforce Learning Collaborative; BSM includes updates at bimonthly Employer Services meeting.</li> </ul>
6. The AJCC has high-quality, well-informed, and cross-trained staffing. <input checked="" type="checkbox"/>	<p><b>Sueños:</b></p> <ul style="list-style-type: none"> <li>Work with the CalJOBS administrator to create Lean standard work for specific youth program CalJOBS data entry functionality; eliminate the single source of CalJOBS trainer knowledge for Sueños staff.</li> <li>Implement the Advanced Individual Fund Tracking (AIFT) functionality in CalJOBS for the WIOA youth Individual Training Accounts (ITAs).</li> </ul>	<ul style="list-style-type: none"> <li>CalJOBS administrator to take the lead on establishing Lean Standard Work for WIOA Youth CalJOBS data entry by PY25/26; develop a CalJOBS workflow for staff by end of PY25/26 incorporating it into the Sueños Ops Flow standard work document</li> <li><b>Implement AIFT functionality for new local ITA policy by PY 24/25 Q4.</b></li> </ul>	<ul style="list-style-type: none"> <li><b>WIOA Youth Operational Flow Standard Work document completed PY25/26 Q2.</b></li> <li>AIFT functionality fully implemented.</li> </ul>
	<p><b>Comprehensive; Sueños:</b></p> <ul style="list-style-type: none"> <li>Continue to improve opportunities to build relationships and better integrate the WIOA partners and contractor (AJCC) staff; improve opportunities to provide updates on center activities and discuss strategies for AJCC improvements; for example, updating the <i>Integrated Service Delivery Guide</i> (ISDG), One-Stop Operator quarterly meetings, Workforce Learning Collaborative, partner round table meetings. [refer to Indicator 2 continuous improvement opportunity]</li> <li>Include partner program services cross-training and capacity building and/or professional development opportunities on the annual training calendar. Include ongoing/annual training on labor market information (LMI), and serving individuals with barriers to employment, including customer with disabilities.</li> </ul>	<ul style="list-style-type: none"> <li>WDB Staff (Community Engagement Initiative) to take the lead on restarting quarterly <i>Roundtable Partner Meetings</i> for front-line WIOA partner and contractor staff to share program updates, integrate best practices and discuss AJCC improvements by PY 25/26.</li> <li>WIOA Contracted Service Provider (GCC) designated staff will maintain the Integrated Service Delivery Guide between partners; share the updated ISDG when necessary.</li> <li><b>WDB Staff will resume the Workforce Learning Collaborative quarterly events for networking across workforce programs and cross program training</b></li> <li><b>Discuss cross training suggestions and opportunities at every quarterly OSO meeting using a standing agenda item; capture both training by a consultant and local partner program services training opportunities. PY 24/25, focus on LMI training.</b></li> </ul>	<ul style="list-style-type: none"> <li><b>Roundtable Partner Meeting pending; expected scheduling by PY25/26 Q3.</b></li> <li>Updated ISDG complete; to be updated quarterly; Created Google folder for partner access.</li> <li>Quarterly Workforce Learning Collaborative Events resumed January 2025 and will be scheduled quarterly.</li> <li>On-going.</li> </ul>

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<p>7. The AJCC achieves business results through data-driven continuous improvement.</p> <p style="text-align: center;"><input checked="" type="checkbox"/></p>	<p><b>Comprehensive:</b></p> <ul style="list-style-type: none"> <li>Continue to use Lean continuous improvement methodology for service enhancements derived from the customer/employer feedback.</li> <li>Use the AJCC Certification Continuous Improvement (CI) Plan to identify Key Performance Indicators (KPIs) to measure effectiveness of services</li> </ul>	<ul style="list-style-type: none"> <li>During collaboration with other AJCCs, see how they are collecting and utilizing customer feedback.</li> <li>PY 25/26, examine KPI's being tracked and refine as needed.</li> </ul>	<ul style="list-style-type: none"> <li>Human Centered Design approach being applied to Universal Referral Form for process improvements.</li> <li>PY 25/26 KPIs: TBD – partners to provide feedback to WDB staff on business services KPIs, taking into account WDB's strategic areas.</li> </ul>
	<p><b>Sueños:</b></p> <ul style="list-style-type: none"> <li>Use Lean continuous improvement methodology for service enhancements derived from the customer/employer feedback.</li> </ul>	<ul style="list-style-type: none"> <li><b>Sueños to take the lead in establishing the WIOA Youth participant specific WEX questions and lead the discussion on whether to break out Youth WEX participant progress questions and the WEX employer survey</b></li> <li>Feedback obtained from surveys will be shared regularly with WDB for service enhancement feasibility</li> </ul>	<ul style="list-style-type: none"> <li>Sueños reviewed their WEX participant and employer surveys– Sueños will continue using the current surveys.</li> <li>On-going monthly.</li> </ul>
	<p><b>Comprehensive; Sueños:</b></p> <ul style="list-style-type: none"> <li>Establish mechanism to capture WIOA performance indicators for all core program partners.</li> <li>Encourage customers to use comment card to capture satisfaction opinions, not just for complaints but for compliments too.</li> <li>Enhance customer satisfaction survey process and increase survey return rate.</li> <li>Establish one system to collect and respond to satisfaction data from <u>employers</u> who used the AJCC business services.</li> </ul>	<ul style="list-style-type: none"> <li><b>Add standing agenda item to OSO meetings for WIOA partner performance discussion</b></li> <li>Ensure all AJCC staff are trained on how to encourage customer comment card completions; track on Contractor KPIs</li> <li><b>Continue to track feedback monthly on the weekly case management board (Lean DMB)</b></li> <li><b>WDB BSM and Sueños to collaborate on the employer surveys</b></li> </ul>	<ul style="list-style-type: none"> <li>WIOA partner performance discussed at quarterly OSO meetings.</li> <li>Staff trained on use of comment cards and are tracking responses under the KPIs.</li> <li>On-going – Lean DMB implemented and in use.</li> <li>After review of WEX employer survey, Sueños plans to keep as is.</li> </ul>

<b>KEY</b>			
<input checked="" type="checkbox"/>	on track to meet planned target for the year	<input type="checkbox"/>	in danger of not meeting target for the year.
<b>Bolded items denote priority for PY 2025</b>			

**America's Job Centers of California (AJCC):**

- Comprehensive AJCC located at 500 Westridge Dr., Watsonville, CA
- Sueños, also known as Specialized AJCC, located at Sequoia High School, 229 Green Valley Rd, Freedom, CA

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## **Report Item: Staff Updates**

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(No vote required)

Director's Updates – Andy Stone

1. Business Services Manager Vacancy
2. WIOA Budget Update
3. [Employment and Training Pathways Program \(ETPP\)](#)
4. Boardable Agenda Management System

Community Engagement/Eligible Training Provider List (ETPL) – Brenda Diaz-Rivas:

1. The James Irvine Foundation – Public Workforce Capacity Grant