



WORKFORCE DEVELOPMENT BOARD OF SOLANO COUNTY

Board of Director's Meeting

Friday, September 20, 2024

8:30 a.m. – 10:30 a.m.



500 Chadbourne Road, Suite A
Fairfield, CA 94534



WORKFORCE DEVELOPMENT BOARD

OF SOLANO COUNTY

BOARD OF DIRECTORS MEETING

Friday, September 20, 2024

8:30 a.m. – 10:30 a.m.

500 Chadbourne Road, Suite A, Fairfield, CA 94534

AGENDA

- I. Call to Order**
- II. Introductions**
- III. Agenda Changes/Deletions**
- IV. Public Comment** – *Public comments on agenda items and items under the jurisdiction of the Board of Directors shall be made at this time and will be taken into consideration without discussion by the Board. Speakers will have a time limit of 3 minutes. No action may be taken on non-agenda items.*
- V. Closed Session**
 - A. Pursuant to §54957.6 Update of Collective Bargaining Agreement Negotiations Between SEIU 1021 and Workforce Development Board of Solano County
 - B. Pursuant to §54957(b) Continuance of the WDB’s President/Executive Director Annual Evaluation and Consideration of Salary Compensation and Benefits
- VI. Open Session**
 - A. Pursuant to §54957.6 Vote and/or Report out on an Action Resulting from Closed Session
 - B. Pursuant to §54957(b) Vote and/or Report out on any Action Resulting from Closed Session
- VII. Consent Calendar**
 - A. Approval of July 19, 2024, Meeting Minutes **1**
 - B. Accept the Workforce Development Board of Solano County’s Final Sub-Monitoring Reports for Adult and Dislocated Worker Programs and America’s Job Center of California (AJCC) **5**
- VIII. Informational Reports**
 - A. Committee Chairs (Verbal)
 - B. President/Executive Director (Verbal)
 - C. Board Chair (Verbal)
 - D. Reports (Written) **15**
- IX. Presentations**
 - A. WDB Business Engagement
 - B. Updates on Solano County’s Adult Education Providers

XI. Informational Updates

- A. Review of Upcoming America’s Job Centers of California (AJCC) Certification Process

X. Action Items

- A. Acceptance of Board Nomination, Thomas Stuebner, and Election to Fulfill the 2024-2026 Board Treasurer Seat **28**
- B. Approval of the WIOA Adult and Dislocated Worker Enrollment and Eligibility Policy **29**
- C. Approval of the First Budget Modification for Fiscal Year (FY) 2024-25, as Recommended by the Budget Committee **65**
- D. Review and Approval of Three Contracts to Build Community Awareness and Pathways into the Bioeconomy Industries or Biotechnology Careers, Funded by the American Rescue Plan Act (ARPA), Not to Exceed \$150,000, For a Period of October 1, 2024 through May 31, 2025 **75**
- E. Approval to Renew the Fairfield WDB Office Lease for an Additional Five (5) Year Term Effective October 1, 2024 through September 30, 2029 for 16,033 Square Feet at 500 Chadbourne Road in Fairfield. **97**

XII. Adjournment

Note: The next Board of Director’s meeting is scheduled for Friday, November 15, 2024

CONSENT CALENDAR



BOARD OF DIRECTORS MEETING MINUTES

July 19, 2024

I. Call to Order

Board Chair, Chris Churchill called the meeting to order at 8:34 a.m. Quorum was established.

Members Present: Chris Churchill, Suzanne Castano, Kelli Courson, Mary Dugbartey, Janice Fera, Deanna Hurn, Chris Huxsoll, Idowu Koyejo, Summer Miguel, Mario Giuliani, Thomas Stuebner, David Tam

Members Absent: Danny Bernardini, Mark DeWeerd, Shannon Dodds, Celia Esposito-Noy, Fadi Halabi, Tim Healer, Coco House, Gerald Huber, Glenn Loveall, Sabrina Martin, Margie Poulos, Stephen Reese

Others in Attendance: Heather Henry, Marion Aiken, April Ziomek-Portillo, Matthew Moon-Bailey, Sheryl Cutler, Darlene Galipo, Kellie Butler

II. Introductions

Ms. Henry announced the attendance of Ms. Darlene Galipo, Deputy Director of Golden Sierra Workforce Development Agency, and Ms. Kellie Butler, Superintendent-President of Solano Community College. Both guests gave a brief introduction.

III. Agenda Changes/Deletions

There were no agenda changes or deletions.

IV. Public Comment

There were no public comments.

V. Closed Session

At 8:36 a.m., Mr. Churchill closed the public meeting and adjourned into a closed session.

A. Pursuant to §54957.6(a) Review and Consider Contribution to Eligible Employee Retirement Plan for 2023 Calendar Performance

B. Pursuant to §54957(b)(1)(2) Annual Evaluation of the WDB's President/Executive Director

VI. Open Session

At 9:29 a.m., the public meeting was reconvened.

A. Pursuant to §54957.6(a) Vote on Contribution to Eligible Employee Retirement Plan for the 2023 Calendar Performance

MOTION #1

With no public comment, a motion was made and seconded to approve a 5% contribution to the eligible employee retirement plan for the 2023 calendar performance.

(Giuliani/Huxsoll) MOTION PASSED UNANIMOUSLY

B. Pursuant to §54957(b)(1)(2) Vote on any Action Resulting from Closed Session

No action was taken by the Board.

VII. Consent Calendar

A. Approval of May 17, 2024, Meeting Minutes

B. Final Approval of the Proposed Preliminary Budget for Fiscal Year (FY) 2024-25

MOTION #2

**A motion was made and seconded to approve the consent calendar, as presented.
(Giuliani/Courson) MOTION PASSED UNANIMOUSLY**

VIII. Informational Reports

A. Committee Chair

Mr. Churchill gave an update regarding the Marketing Committee meeting. The committee discussed various personas and website updates centered around the marketing audit and plan provided by Elevation Group. There is some work that needs to be done to refine the categories our community may fall under as job seekers and businesses. A budget review will also be forthcoming to identify how funding is spent on outreach.

Mr. Aiken announced the Equity Committee is in the beginning phase. The committee is in the planning stages right now and identifying a starting point. The committee is hoping to have all members present at the next meeting to help identify the starting point and discuss further on collaborative efforts between staff and partner organizations.

Mr. Huxsoll highlighted that the Planning & Oversight Committee, who met in August, discussed the WIOA compliance items of focus this year and reviewing partnerships and industry-based solutions. WIOA compliance items include the Regional and Local Planning process, which will be due at the end of March, Job Center Certifications, and Job Center Partner MOU's.

B. President/Executive Director Report

Ms. Henry highlighted from the report that staff have been going through our internal monitoring process and is in the process of finalizing the Adult and Dislocated worker and job center internal monitoring. These will be presented to the Planning & Oversight Committee in August and the Board of Directors in September. Staff have recently received from the State that we are scheduled for our annual monitoring in mid-October.

Ms. Henry announced the year end cycle hasn't fully been closed. Both the final expenditures and final program numbers will be fully presented at the September meeting. Ms. Henry added that although a fiscal staff member has moved on to another opportunity, Ms. Adriana Balandran has transitioned from our ARPA contracted staff to a full-time staff person to backfill this position. She has been a strong support person and jumped right into year-end close.

WIOA enrollments are back to pre-COVID levels. There are now over 300 active participants in our Adult/Dislocated Worker programs. The Job Center and Job Seeker Services team have been doing a lot of outreach and going out in the community trying to really push different types of platforms, including a digital marketing campaign.

On the industry side, as part of our ARPA industry project, certification training has been offered including the ServSafe Food Manager Certification, Forklift Certification. These programs have been very successful. There is currently a waiting list for future Forklift Certification.

The Small Business Development Center recently had their program review. It was announced that in the first 6 months, 60% of their clients have received or have gained an economic impact. Their goal is 30%. They have had 33 new business starts, an increase of \$16.3 million in sales with the businesses that they've worked with and helped them to secure \$43.5 million in loans or equity.

Ms. Henry added there are 3 presentations that have been requested by the Board that staff will be working on over the next few Board meetings. We will be bringing in our regional workforce partners. For us in the North Bay would be Sonoma and the Workforce Alliance of the North Bay which covers Lake, Mendocino, Marin and Napa counties, so you can hear a little bit more about the region and some of the differences. We will also be scheduling the Farm Bureau but will balance the scheduling of this around harvest time. The last one is from Business Services and hearing about what they are hearing from the business community and some of the projects working with businesses.

It was announced there will be a Vallejo Job Fair held on August 1, 2024. Ms. Ziomek-Portillo added there are about 25 employers currently registered to have a booth with a goal of reaching 40 employers. The event will be held in Vallejo to focus on bringing open position awareness to the Vallejo community. L.E.A.D. Certification for businesses is being offered again. It is a six-week virtual training and is being offered at no cost. The normal cost is around \$1,000 but with ARPA funding, the training cost is covered.

Ms. Henry announced the SBDC is doing an introduction to AI for small businesses. This will be a two-part series held on July 23 and July 30. The training will answer questions like AI utilization, integration, and how it can help. SBDC is also offering Gallup's StrengthsFinder for a fee. There are already 4 businesses and organizations that have gone through the process. There are 2 different ways to sign up for it. You can go directly through SBDC's website, pay the \$99 fee, do the assessment and have an hour coaching with Mr. Murrill, SBDC's Director, or one can schedule directly with him.

Lastly, Ms. Henry added that September is National Workforce Development month. The Celebrating Solano's Workforce event will be held in September, once again, to recognize workforce heroes among job seekers, businesses, and community. Staff will also be going to the Board of Supervisors again to do a presentation and to bring some staff to be recognized.

C. Board Chair

Mr. Churchill announced the Working Waterfront has a website waterfrontjobs.com. The coalition is creating manufacturing jobs, a lot of skilled labor working with ferries and different things. Registration availability is important as well as the importance of having information available such as certifications, potential average wages for available positions and metrics to show information people want to know when considering open jobs. Our metrics of success here is how we reach people and how we are assisting them, along with how the money we invested in the community impacts them. We are going to need skilled workers and fabricators for Mare Island jobs and need to consider how future outreach and investment play a role.

E. Reports

There was no further discussion on this item.

IX. Action Items

A. Board Nominations and Elections for 2024-2026 Slate of Officers and Executive Committee's 2024-2026 Member-at-Large

It was announced that the Ad-Hoc Nominations Committee met on July 2, 2024 to discuss the elections and review nominations, noting Mr. Giuliani would be willing to continue as Board Treasurer through September 30, 2024 to allow a successor to be identified. An initial interest in this seat was not received by any Board members at the time of the committee meeting.

MOTION #3

A motion was made and seconded to approve the Board Nominations and Elections for 2024-2026 Slate of Officers and Executive Committee's 2024-2026 Member-at-Large (Courson/Tam) MOTION PASSED UNANIMOUSLY

B. Review and Approval for a Contract with O&G Racial Equity Collaborative for Racial Equity Technical Assistance and Training for an Amount Not to Exceed \$91,050, Funded by the James Irvine Foundation; Give President/Executive Director Authority to Finalize and Sign the Approved Contract, and Make Administrative Changes, as Needed.

Mr. Aiken gave an overview of the contract with O&G Racial Equity Collaborative noting that with James Irvine Foundation, staff looked at the DEI concept and interviewed 4 different companies. O&G came highly recommended and aligned with our goals.

MOTION #4

A motion was made and seconded to approve a contract with O&G Racial Equity Collaborative as presented; give President/Executive Director authority to finalize and sign the approved contract, and make administrative changes, as needed (Fera/Tam) MOTION PASSED UNANIMOUSLY

X. Presentation

A. Highlight on Emerging Industries – Climate Transition

Due to timing, this item will be moved to a future Board meeting.

XI. Adjournment

The meeting was adjourned at 10:30 a.m.

Respectfully submitted by: Tammy Gallentine, Executive & Board Support Specialist



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

AGENDA SUBMITTAL

SUBJECT Accept the Workforce Development Board of Solano County’s Final Sub-Monitoring Reports for Adult and Dislocated Worker Programs and America’s Job Center of California (AJCC)	MEETING DATE September 20, 2024	AGENDA ITEM VII.B
FROM: Heather Henry, President/Executive Director	ACTION REQUIRED YES ✓ NO	ATTACHMENTS A & B

RECOMMENDATION

Staff and the Planning & Oversight Committee recommend that the Board of Directors of the Workforce Development Board (WDB) of Solano County accept the WDB’s final sub-monitoring report for the Adult and Dislocated Worker program and for the America’s Job Center of California (AJCC). The committee review and accepted the reports at their August 27, 2024 meeting.

SUMMARY

The WDB staff conducted an internal monitoring of the Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker Programs during the week of April 29, 2024, per WIOA sub-recipient monitoring regulations, for the period of January – December 2023. In addition, staff conducted an internal monitoring of the WIOA AJCC during the week of June 2024.

The Performance and Compliance Analyst conducted a thorough review of Adult and Dislocated Worker Programs to:

- Ensure only eligible participants were enrolled and applicable eligibility documentation was collected and properly recorded;
- Ensure proper maintenance and content of participant records to include data validation requirements;
- Confirm appropriate and adequate case notes were documented ensuring continuity from time of application through completion of services;
- Verify all relevant participant data and services had been accurately and timely recorded into the state’s MIS;
- Ensure programs and activities were effective in meeting the goals established in the four-year local plan;
- Verify that the training and work environment were safe for participants and staff members;
- Confirm compliance with the ADA and nondiscrimination and equal opportunity provisions of WIOA and other federal and state nondiscrimination laws; and
- Ensure that appropriate grant and program management policies and procedures as defined by WIOA were in place.

The Performance and Compliance Analyst conducted a thorough review of the AJCC to:

- Ensure the one-stop delivery system's compliance with the requirements of WIOA, the activities per Solano's Workforce Development Local Plan, and performance reporting requirements;
- Compliance with procurement and oversight of the one-stop operator;
- America's Job Center of California (AJCC) compliance, including compliance with WIOA Sections 121 and 188, Americans with Disabilities Act, and nondiscrimination laws and regulations; and
- Compliance with the AJCC Memorandum of Understanding and Infrastructure Funding Agreement regulations.

The final Adult and Dislocated Worker and AJCC internal monitoring reports are presented, outlining the observed best practices, concerns, and potential findings.

DISCUSSION:

Background:

Workforce Innovation and Opportunity Act (WIOA) guidelines require adherence to subrecipient federal compliance and monitoring guidelines. As the WDB is also the provider of WIOA Title I activities, the Local Board is required to monitor its own activities. Policies and practices are in place for internal firewalls between staff providing services, staff responsible for oversight, and the Local Board. Internal monitoring must be conducted annually.

The internal monitoring process included a(n):

- Desk review of Adult and Dislocated Worker policies and procedures, training agreements, and pre-monitoring questionnaires completed by program staff;
- On-site monitoring visit of the WIOA Adult and Dislocated Worker program files;
- On-site monitoring visit of the AJCCs; and an
- Interview with an Adult/Dislocated Worker staff member regarding service delivery and knowledge of compliance requirements.

Summary of Final Monitoring Review

Adult/Dislocated Worker

In general, the Performance and Compliance Analyst found the Adult and Dislocated Worker programs and the AJCC to be in compliance. Areas of best practice, concern, and potential findings were observed.

An issue identified in the last monitoring was the inconsistency of dates between files and CalJOBS. This was corrected and no new date inconsistencies were identified in the current monitoring year.

Three findings were identified:

1. **Observation:** Some files were reviewed that had supportive services documentation in the file, but activity codes in CalJOBS were not entered. Some case notes on supportive services entered in CalJOBS did not meet the case note requirements outlined in WDB's *Supportive Services and Incentive Policy*.

Corrective Action Plan: Program management will conduct staff training on case notes and supportive service entries into CalJOBS to ensure staff understanding of the policies.

This finding will remain open until the next monitoring.

2. **Observation:** One of the files reviewed was coded in CalJOBS as WIOA Adult, but was funded out of ARPA. As such, the programmatic and performance information in CalJOBS did not match expenditure reporting.

Corrective Action Taken: Program staff completed a Data Change Request form to update the client data in CalJOBS to match expenditures.

This finding will remain open until the next monitoring.

3. **Observation:** Disability information was observed within the participant's working file. All disability-related information must be stored in a separate file or folder to be in compliance with nondiscrimination and equal opportunity provisions.

Corrective Action Taken: All disability information was removed from the participant's case file.

This finding is now closed.

A draft monitoring report was submitted to the Adult and Dislocated Worker staff documenting potential compliance issues and findings on May 24, 2024. The Adult and Dislocated Worker staff responded and corrected any findings noted on the report. A final monitoring report was issued on July 19, 2024.

America's Job Centers of California (AJCC)

The Performance and Compliance Analyst found the AJCC to be in full compliance. No findings were identified.

A draft monitoring report was submitted to the AJCC staff documenting potential compliance issues and findings on July 3, 2024. A final monitoring report was issued on August 23, 2024.

REPORT PREPARED BY

Heather Henry, President/Executive Director. Please contact Sonam Rajbhandary at 707-863-3510 if you have any questions regarding the information in this report.



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

July 19, 2024

Workforce Development Board of Solano County
ATTN: Marion Aiken, Workforce Services Director
500 Chadbourne Rd, Suite 100
Fairfield, CA 94534

RE: Final Sub-Monitoring Report for Adult and Dislocated Worker Program

Dear Mr. Aiken,

This final monitoring report is to inform you of the results of the Workforce Development Board (WDB) of Solano County's sub-monitoring review of Adult and Dislocated (AD/DW) programs.

The purpose of the review was to determine Workforce Innovation and Opportunity Act (WIOA) compliance by AD/DW with applicable federal, state, and local laws, regulations and policies, and any additional program requirements. This review focused on AD/DW's Desk Review, Program Files, and the Staff Interviews.

This report is based on the review of applicable policies and procedures, the information collected from AD/DW monitoring questionnaire and staff interviews. This report also includes findings from the Desk Review. The WDB has examined compliance with the requirements of WIOA, the Uniform Guidance at 20 CFR parts 678- 683.

AD/DW REVIEW RESULTS

Areas of Best Practice

- AD/DW staff were found to be very knowledgeable about their roles and responsibility. Staff were found to be resourceful and found to be well-informed of all the resources available to job seekers, as well as in areas of compliance.
- Staff members were very cooperative in the whole monitoring process.
- Files were labelled properly so it was easier to go over them.
- Last time, an issue noted during monitoring was the inconsistency of dates, but this time, the dates in CalJOBS and the files aligned appropriately.

Linking Employers with Employees

☐ **North-county Office:** 500 Chadbourne Road, Suite A, Fairfield, CA 94534 | (707) 863-3500 | FAX (707) 864-3386

☐ **South-county Office:** 1440 Marin Street, Vallejo, CA 94590 | (707) 863-3500 | FAX (707) 864-3386

solanoemployment.org

Area of Noncompliance and Corrective Action:

Finding One (1):

Cause:

From WIOA 116: “In preparing the State reports described in this subsection, each State shall establish procedures, consistent with guidelines issued by the Secretary, in conjunction with the Secretary of Education, to ensure the information contained in the reports is valid and reliable.”

Performance and fiscal reports regarding services paid out of grant funds must match and have proper backup to ensure validity of services and grant allocation.

Observation:

Some files reviewed had supportive services documentation in the file and were shown as expended, but not reported in CalJOBS under a supportive services activity code. If funds are expended on participants using WIOA funds, activity codes must be entered to ensure information in the PIRL (Participant Individual Record Layout) reported to Department of Labor is accurate. Staff need to enter the supportive services activity code and put case notes mentioning the amount and date that the supportive services were provided per the WDB *Supportive Services and Incentive Policy*. In addition to this staff should also include which grant the supportive services is attributed to in the case notes.

CalJOBS ID	Observation
570448108	Had Supportive services on file but not in CalJOBS as an activity code.
344374192	Had Supportive services on file but not in CalJOBS as an activity code.
1005436236	Had Supportive services on file but not in CalJOBS as an activity code.
314664450	Had Supportive services on file but not in CalJOBS as an activity code.

Corrective Action Required:

If Supportive Services and Incentives are not entered into Cal JOBS as required, corrective action is necessary to rectify the situation. The following steps could be taken as corrective action:

Document Review: Verify if the supportive services and incentives were actually provided to the participants. This may involve reviewing any physical records, receipts related to supportive services or incentives.

Data Entry: Enter the missing information in Cal JOBS system and complete a data change request as necessary. Ensure that all the details are accurately recorded, including the date, type of supportive services or incentives and the participant’s information.

AD/DW must ensure that all the supportive services in the file are reported in CalJOBS. This is a repeat finding; please make sure that AD/DW will be compliant on reporting the supportive services and will not repeat this error again. The WDB suggests revisiting policies and procedures with staff to ensure full staff understanding.

WDBSC Response:

It is clearly documented in current policies and procedures that supportive services activities are reported in Cal JOBS. Both documents state the following:

Supportive Services Policy & Procedure – *“The use of funds is based on their availability. Supportive services provided must be reasonable, necessary, appropriate, and allowable. It is the responsibility of staff to ensure allowable, reasonable, and appropriate utilization of supportive services funds. Such justification will be documented via case notes in Cal JOBS, with an explanation of the lack of community resources available to the participant.”*

Therefore, the monitor’s recommendation is fully accepted and WDBSC Management Team will ensure that both current policy and procedural guidelines are reviewed with staff periodically. Documented instructions and timelines to enter such activities and case notes will be included in the review for participants’ case files from active enrollment and throughout the retention periods. These actions will occur by the end of this fiscal year, June 30, 2024, and include discussions related to concerns, issues, and suggestions stated in the letter.

Corrective Action Taken:

CalJOBS ID: 570448108- Client file is currently in Retention and a Data Change Request form(DCR) request was signed and in process today, 6/20/24 to update client data to include case notes and appropriate activity code to annotate that supportive services were provided.

CalJOBS ID: 344374192- Data Change Request form (DCR) was submitted on 6/4/24 to update client data and include case notes and appropriate activity code 181 for transportation supportive services provided.

CalJOBS ID: 1005436236- Activity Code 188 for supportive services provided has been entered into client case notes and activities as of 6/20/24.

CalJOBS ID: 314664450- Data Change Request form (DCR) must be submitted to update client data and include case notes and appropriate activity code 188 to annotate supportive services provided.

WDB Conclusion:

Thank you for accepting the monitor's recommendation regarding the review of current policy and procedural guidelines. We are pleased to hear that the WDBSC Management Team is fully committed to implementing the suggested actions and ensuring continuous improvement within the organization. We acknowledge and appreciate the Data Change Request submitted as part of the corrective action plan. The WDB accepts the Adult/Dislocated Worker program’s corrective action plan. However, this finding will remain open until it can be confirmed in our next monitoring.

Finding Two (2):

Cause:

From WIOA 116: “In preparing the State reports described in this subsection, each State shall establish procedures, consistent with guidelines issued by the Secretary, in conjunction with the Secretary of Education, to ensure the information contained in the reports is valid and reliable.”

Performance and fiscal reports regarding services paid out of grant funds must match and have proper backup to ensure validity of services and grant allocation.

Observation:

One of the files had Occupational Training code funded by WIOA but the 300 code was put in ARPA in CalJOBS. Since WIOA funded the training, the programmatic and performance information contained in CalJOBS must align with the expenditure reporting.

CalJOBS ID	Observation
779452268	The Occupational code (300) was entered into ARPA instead of WIOA.

Corrective Action Required:

AD/DW must ensure that the programmatic and performance data for training is attributed to the grant providing funds for the training.

Data Entry: Enter the missing information in Cal JOBS system and complete a data change request as necessary. Ensure that all the details are accurately recorded, including the date, and the participant’s information.

AD/DW must ensure that the occupational training code in the file is reported correctly in CalJOBS. Please make sure that AD/DW will be compliant on reporting occupational training in CalJOBS and will not repeat this error again. The WDB suggests revisiting policies and procedures with staff to ensure full staff understanding.

Corrective Action Taken:

CalJOBS ID 779452268- Data Change Request form (DCR) signed and dated 6/18/24 to update client data and include case notes and appropriate Occupational code 300 for WIOA Adult program instead of ARPA.

WDB Conclusion:

Thank you for submitting the Data Change Request as part of the corrective action plan to address the finding. We appreciate your efforts. However, the finding will remain open until the next monitoring.

Finding Three (3):

Cause:

Under the requirement of 29 CFR 38.41-38.45 and WSD 17-01, collection, use, storage, and disclosure of medical and other data in compliance with the nondiscrimination and equal opportunity provisions of Section 188 of the Workforce Innovation and Opportunity Act (WIOA).

Observation:

Upon reviewing AD/DW participants files, the monitor identified that a participant’s disability- related documents were stored together in the participant file.

One participant was identified to have disability related document in the file.

<u>CalJOBS ID</u>	<u>Observation</u>
906866399	Disability information was on file.

Corrective Action Required:

All disability-related documents should be removed and placed in a separate file or folder from the working participant file. AD/DW must ensure that the file is easily identifiable, labeled clearly and appropriately secured to maintain confidentiality.

Corrective Action Taken:

CalJOBS ID 906866399- All disability information for State ID 906866399 was removed from the case file and placed in a folder and locked in a secured file cabinet drawer.

WDB Conclusion:

Thank you for removing the disability information from the file and placing it in a locked and secure file cabinet drawer as part of the corrective action. The monitor reviewed the file to confirm that the issue had been resolved. The finding is now closed.

Because the methodology for our monitoring review included sample testing, this report is not a comprehensive assessment of all areas included in our review. It is AD/DW’s responsibility to ensure that its AD/DW systems comply with the WIOA federal and state regulations, applicable state directives, and WDB policies.

These monitoring results are based on the WDB’s interpretation of the statue, along with the Workforce Innovation and Opportunity Act (WIOA), Uniform Guidance, the Final Rule released by the U.S. Department of Labor, and federal and state policies relating to WIOA implementation.

If you have any questions, feel free to contact Sonam Rajbhandary, Performance and Compliance Analyst at srajbhandary@solanowdb.org or at 707-863-3510.

Sincerely,



Heather Henry
President/Executive Director



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

August 23, 2024

Solano America's Job Center of California
ATTN: Tracy White, Senior One-Stop Manager
500 Chadbourne Rd, Suite A
Fairfield, CA 94534

RE: Final Sub-Monitoring Report for America's Job Center of California

Dear Ms. White,

This final monitoring report is to inform you of the results of the Workforce Development Board (WDB) of Solano County's sub-monitoring review of America's Job Center of California (AJCC) sites in Fairfield and Vallejo for the period of 1/1/2023 to 12/1/2023.

The review purpose was to determine Workforce Innovation and Opportunity Act (WIOA) compliance by AJCC with applicable federal, state and local laws, regulations and policies, and any additional program requirements. This review focused on AJCC's Desk Review, Site visit, and the Front Desk staff interviews.

The AJCC monitoring took place on the week of June 10, 2024, to June 14, 2024. This report is based on the review of applicable policies and procedures, AJCC MOUs, Partner MOUs, One Stop Operator contract and the information collected from AJCC monitoring questionnaire. The WDB has examined compliance with the requirements of WIOA, the Uniform Guidance at 2 CFR part 200 and 2 CFR part 2900.

AJCC REVIEW RESULTS

In general, the compliance pieces were in place.

Areas of Best Practice

- The Vallejo AJCC has resolved one of the concerns from our previous monitoring. Proper AJCC signage is now visible externally, displaying the America's Job Center common identifier branding.
- Fairfield AJCC staff were found to be very knowledgeable in a variety of tools and resources available to job seekers, as well as in areas of Compliance.
- Both AJCCs sites are easily accessible via public transportation and have plenty of free parking spaces available nearby.

Linking Employers with Employees

Review Result

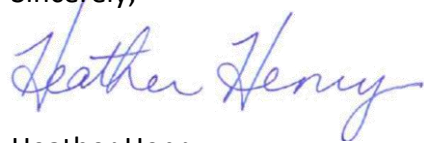
We conclude that we did not identify any areas of the Solano AJCC that did not meet WIOA requirements concerning AJCC compliance.

Because the methodology for our monitoring review included sample testing, this report is not a comprehensive assessment of all areas included in our review. It is AJCC's responsibility to ensure that its AJCC systems comply with the WIOA federal and state regulations, applicable state directives, and WDB policies.

These monitoring results are based on the WDB's interpretation of the statute, along with the Workforce Innovation and Opportunity Act (WIOA), Uniform Guidance, the Final Rule released by the U.S. Department of Labor, and federal and state policies relating to WIOA implementation.

If you have any questions, feel free to contact Sonam Rajbhandary, Performance and Compliance Analyst at srajbhandary@solanowdb.org or at 707-863-3510.

Sincerely,



Heather Henry
President/Executive Director
Workforce Development Board of Solano County

REPORTS





WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

AGENDA SUBMITTAL

SUBJECT Reports	MEETING DATE September 20, 2024	AGENDA ITEM VIII.D
FROM Heather Henry, President/Executive Director	ACTION REQUIRED YES NO ✓	ATTACHMENTS A - C

SUMMARY

Staff has provided written updates on the following attached reports. Highlights will be summarized verbally.

ATTACHMENTS:

- Attachment A: Compliance & Operational Reports – monitoring and personnel
 - Final FY23-24 expenditure report
- Attachment B: Programmatic Highlights
- Attachment C: Programmatic Performance Reports
 - Final FY23-24 Job Seeker Services Grant Metrics
 - FY24-25 Job Seeker Services Grant Metrics through August 2024
 - SBDC Service Report

Compliance and Operational Report



The Compliance and Operational Report provides an overview of monitoring and personnel updates occurring since the last board meeting.

Monitoring Report

This report updates the Workforce Development Board (WDB) of Solano County on the outcomes of the Federal, State, and County audit and monitoring reviews of the agency operations. Open and prior audit and monitoring reports are available on request.

Definitions for the types of outcomes are:

- 1) Finding is an instance of noncompliance with grant rules that must be resolved through corrective action – findings that could lead to a disallowed cost will be noted as such; and
- 2) Concern is a condition that may become a compliance issue if not addressed.

Recent/Open Monitoring Activity:

- The EDD Compliance Review Unit conducted a desk review of the WDB's **Equal Employment Opportunities (EEO)** activities funded by WIOA in November 2021. ***EDD issued a final monitoring report on June 24, 2022, and determined the following finding:***

Finding 1: Upon reviewing participant files, EEO Specialist identified that disability and medical related information was being collected and stored together. EDD recommends the WDB collect and store Equal Opportunity Questionnaires separately from the participant files; review all forms and assessments to ensure questions about disability and medical questions are on a separate sheet; redact disability and medical information from participant files; and store files with disability and medical information separately.

WDB Response: While the current practice is to maintain disability and medical-related information in a separate file, staff will review all participant files to ensure that such a practice is consistently adhered to. A follow-up on file reviews previously conducted will continue until all active and exited files are thoroughly reviewed and corrected. WDBSC plans for this action to be completed no later than June 30, 2022.

EDD accepted the WDB's corrective action plan and this finding is now closed.

Personnel Report

The Personnel Report provides the Board with information regarding recruitments, promotions, and departures of WDB employees. There were no staffing changes during the reporting period.

Expenditure Report

This is the Workforce Development Board of Solano County's (WDB) final report of expenditures for the 2023-24 program year, through June 30, 2024. With 100% of the program year elapsed, the expenditures compared to the plan equal 73%.

Attachment A-1 contains the expenditure report; the report format shows the funding and expenditure information from two viewpoints. The top box contains grant funding vs. grant expenditures. The bottom box contains line-item budget vs. line-item expenditures.

Significant Grant Discrepancies:

Discrepancies of more than 10% are highlighted below.

- WIOA Dislocated Worker completed the year underspent, due to lack of enrollments. Staff are currently reviewing options for improving dislocated worker expenditures.
- WIOA Youth completed the year underspent, predominantly due to low expenditures of youth contractors. Staff have developed a plan to spend the carryover funds with a WIOA-funded climate youth program.
- WIOA Rapid Response included a carryover from prior year than had to be expended by September 2023. FY2022-23's funds were not fully expended, impacting budget totals.
- CWDB Grants – Prison to Employment 2.0, Regional Equity, and Regional Plan Implementation 5.0 completed the year underspent due to programmatic delays. The funds carry over into FY2024-25 and are anticipated to be fully expended by grant end.
- City of Napa – ARPA Leaf Blower Grant completed the year underspent. Staff continue to reevaluate outreach methods to increase business participation.
- County of Napa – ARPA Childcare Loan Support completed the grant term underspent. Remaining funds were deobligated.
- Solano ARPA Projects are behind in most expenditures. However, procurements have been fully completed and funds are fully obligated. Funds can be carried over into FY2024-25 and are anticipated to be fully expended by grant end.
- SBDC CIP completed the year overspent; however was within grant budget. This higher-than-anticipated expenditures reduced the funding available for FY2024-25.
- SBDC SBA and TAP are currently underspent due to the budgeting cycles of SBA funding. Expenditures are anticipated to be fully expended by the grant end date.
- SBDC Program Income completed the year overbudget. SBDC began a new initiative – StrengthsFinder Assessments and Coaching – during the fiscal year than increased program income revenue and expenditures.

Significant Expenditure Discrepancies:

Discrepancies of more than 10% and \$10,000 are highlighted below.

- Salaries and Benefits completed the year underspent, primarily due to ARPA 4 positions that remained unfilled. This funding can be carried over into FY2024-25 to support the ARPA time extension.
- Vocational Training and Work-Based Training completed the year significantly underspent, but enrollments have increased and ARPA projects are planned for FY2024-25. The carryover training expenditures are anticipated to be fully spent in the coming fiscal year.
- Supportive Services were expended at a higher rate than anticipated. Some of these costs were considered leveraged training expenditures. Adjustments in FY2024-25 will be made to meet the supportive services needs of incoming participants.
- Small Business Grants / Payments, Outreach, and Program Contracts completed the year significantly underspent, primarily due to programmatic delays in the ARPA projects. These funds can be carried over and are anticipated to be fully spent in the next fiscal year.
- Communications / IT is overspent due to costs being categorized as communications rather than supplies and equipment. Adjustments have been made in the FY2024-25 budget to better reflect expenditure trends.
- Employee/WDB Professional Development completed the year overspent due to dedicated professional development revenue from Irvine Foundation.
- Supplies / Equipment / Software completed the year underspent. Part of the expenditures were included in the Communications / IT line item; other planned expenditures were for Vallejo AJCC upgrades under ARPA that will be expended in FY 2024-25.

WDB SOLANO

FY2023-24 Final Revenue and Expenditure Report - as of June 30, 2024

	BUDGET 2023-24 Mod 1 Approv. 9/23	Jun '24 Actuals	% Expended	Carry-Over Funds Avail. 7/24
REVENUE:				
<i>State Grant Revenue</i>				
WIOA Adult	\$1,133,204	\$1,099,456	97.0%	\$33,748
WIOA Dislocated Worker	1,171,143	953,006	81.4%	218,137
WIOA Youth	1,214,843	900,873	74.2%	313,970
WIOA Rapid Response	178,527	151,007	84.6%	-
WIOA Layoff Aversion	29,625	29,625	100.0%	-
CWDB - CNA Upskilling Program	108,480	62,160	57.3%	-
CWDB - Prison to Employment 2.0	182,967	61,609	33.7%	121,358
CWDB - Regional Equity	446,461	153,784	34.4%	292,677
CWDB - Regional Plan Implementation 5.0	106,211	87,651	82.5%	-
Grant Revenue Total	\$4,571,461	\$3,499,172	76.5%	\$979,890
<i>Other Government Grants/Contracts</i>				
City of Napa - Leaf Blower	\$84,578	\$33,408	39.5%	51,170
County of Napa - ARPA Childcare Loan Support	\$3,943	\$915	23.2%	-
County of Napa - Napa Success Business Accelerator	\$0	\$117,222	0.0%	-
County of Solano - ARPA 1: Sustain Service Delivery	272,587	124,285	45.6%	148,302
County of Solano - ARPA 2: Community Workforce	1,399,086	905,784	64.7%	493,302
County of Solano - ARPA 3: Industry Training	1,302,285	683,349	52.5%	618,936
County of Solano - ARPA 4: Community Engagement	733,939	377,854	51.5%	356,085
County of Solano - ARPA SB1: Small Business TA	333,017	325,965	97.9%	7,052
County of Solano - ARPA SB2: Business Incubator	280,710	203,989	72.7%	-
County of Solano - ARPA SB3: Services for Businesses	331,339	96,898	29.2%	234,441
County of Solano - Farm Microgrants	353,300	330,486	93.5%	-
CWDB - HIRE	-	200,720	0.0%	-
FSUSD - Restaurant Resiliency	15,600	17,625	113.0%	-
NorCal SBDC - Capital Improvement Program (CIP)	102,786	126,536	123.1%	(23,750)
NorCal SBDC - Small Business Administration (SBA)	178,587	149,591	83.8%	28,996
NorCal SBDC - Technical Assistance Program (TAP)	159,194	139,028	87.3%	20,166
NorCal SBDC - Inclusivity Project	-	19,995	0.0%	-
SBDC Local Match	54,941	50,768	92.4%	4,799
Other Government Revenue Total	\$5,605,892	\$3,904,418	69.6%	\$1,888,329
<i>Other Revenue</i>				
Irvine Capacity Building	\$0	51,106	0.0%	(51,106)
Napa Valley College	\$3,318	904	27.2%	2,414
SBDC Program Income	\$5,307	17,305	326.1%	4,321
WellsFargo - Dream Incubator	\$13,974	13,974	100.0%	-
Other Revenue Total	\$22,599	\$83,289	368.6%	-\$44,371

	BUDGET 2023-24 Mod 1 <i>Approv. 9/23</i>	Jun '24 Actuals	% Expended	Carry-Over Funds <i>Avail. 7/24</i>
<i>Donations and Contributions</i>				
Mare Island Contribution	\$20,000	\$10,447	52.2%	\$9,553
SBDC Donations and Sponsorships	\$6,715	\$50	0.7%	\$6,665
Donations and Contributions Total	\$26,715	\$10,497	39.3%	\$6,665
TOTAL REVENUE	\$10,226,667	\$7,497,376	73%	\$2,830,514
EXPENSES:				
Salaries and Benefits	\$3,433,335	\$2,834,571	82.6%	
Personnel Expenses	\$3,433,335	\$2,834,571	82.6%	
Vocational Training	\$970,966	\$547,371	56.4%	
Work-Based Training	\$125,878	108,193	86.0%	
Supportive Services	\$31,466	75,417	239.7%	
Business Advisors	\$349,288	378,765	108.4%	
Small Business Grants / Payments	\$1,906,820	812,438	42.6%	
Outreach	\$378,687	23,286	6.1%	
Program Contracts	\$2,083,621	1,851,633	88.9%	
Direct Program Costs	\$5,846,725	\$3,797,103	64.9%	
Communications / IT	\$91,846	\$129,495	141.0%	
Employee / WDB Professional Dev	\$33,470	49,243	147.1%	
Facilities	\$494,315	449,098	90.9%	
Memberships	\$14,100	12,705	90.1%	
Mileage / Travel	\$14,875	10,734	72.2%	
Supplies / Equipment / Software	\$132,291	49,730	37.6%	
Other Operating Costs	\$165,711	162,294	97.9%	
Other Costs	\$946,607	\$863,299	91.2%	
TOTAL EXPENSES	\$10,226,667	\$7,494,973	73%	\$0

Revenue Over / (Under) Expenses

\$2,403

Programmatic Highlights



The Programmatic Highlights Report provides a narrative of key activities for America’s Job Center of CA (AJCC) activities; Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker, Youth, and Rapid Response Grants; discretionary grants; American Rescue Plan Act (ARPA) projects; and the Solano Small Business Development Center (SBDC) occurring since the last board meeting.

America’s Job Center of California (AJCC)

This report provides an update on activities conducted at the America’s Job Center of California (AJCC) and other community locations for the period of March to April 2024.

Reporting period highlights include:

- New Road to Employments and outreach to Vallejo and Vacaville Adults – Beginning in July 2024, AJCC staff have gone to Vallejo and Vacaville Adult Schools in person expanding the Road to Employment navigation resources to students. The Vallejo Adult School is also offering an instructor beginning in August to provide Northstar Basic Computer instruction inside the Vallejo Job Center twice per week; these sessions are open to the public and at no cost to learn computer navigation, basic email, and internet searching techniques.
- Systems-Impacted Solano Network (SISN) – AJCC staff hosted the first in person meeting of the System Impacted Solano Network (SISN) since pre-COVID. There was a small showing and a lot of interest in planning for the next 2 years focusing on creating a living document for resource sharing and warm handoffs between partners, building a useful website in support of breaking down silos, building bridges to co-enrollments, and blending funding sources where possible. The next meeting will be scheduled for Spring 2025, for more information email to scutler@solanowdb.org

WIOA Programs

The Workforce Services Division is responsible for employment and training services of eligible WIOA Adult, Dislocated Worker, and Youth participants. A significant percentage of the organization’s participants participate in WIOA programs. Reporting period highlights are below.

Job Seeker Services:

- Active Participants – The Job Seeker Services (JSS) team is currently serving approximately 350 clients with job search and training opportunities. These numbers do not include the ARPA projects that JSS team members are supporting. The JSS unit is excited to adding a new Workforce Employment Specialist (Spanish Speaking) to the team soon. Interviews start next week to fill the position.

- Behavioral Design Training – The Job Seeker Services team and community partners attended a training by Irrational Labs in August, through Irvine Foundation funding, to improve customer service and empathy by using behavioral design principles.

Youth Services:

- First Place for Youth – First Place for Youth has recently focused on providing workshops to participants beginning the school year. Workshop topics included Back to School basics and Best Practices for Academic Success. First Place for Youth continues to partner with the WDB JSS team to assist participants in obtaining occupational training and certifications.

Business Services:

- Vallejo Career Fair – In partnership with Solano Community College, this event was held on the Vallejo campus on August 1, 2024 from 10am to 1pm. The WDB hosted 39 businesses and over 260 job seekers were in attendance.
- Fall Career Fair – WDB will be hosting a fall career fair at the Fairfield WDB job center on October 17, 2024. Staff are anticipating up to 25 businesses to be in attendance. Staff are currently marketing this event on all social media channels.
- Layoff Activity – WDB staff was asked to collaborate on a layoff with Napa County for IKEA Fulfillment Center in American Canyon. This layoff will affect 150 workers throughout Napa and Solano counties. The first round of workers were laid off in August. A second round will take place in Mid-September 2024. The center is set to close in February 2025. Another round of layoffs is expected early in 2025.

ARPA Grants

The WDB and SBDC collectively implements fifteen (15) projects across seven (7) contracts under the American Rescue Plan Act (ARPA) to benefit both job seekers and small businesses on behalf of the County of Solano:

- Sustain / Extend Current Services –WDB Training
- Community Workforce Services – Community Workforce Grants, Technical Assistance and Infrastructure Grants for Nonprofits
- Industry-Based Job Training
- Expanding Community Engagement – Community Engagement and Job Readiness, Virtual Service Tools, Vallejo Job Center Improvements, Employer Resource Network
- Small Business Advising – Expanded SBDC Advising, Culturally Competent Advising, Business Peer Advisory Groups
- Business Incubator – Incubator Trainings, Microgrants
- Services for Businesses – Business Training Series, Business Translation Services Pilot, Work-Based Mental Health Services

Reporting period highlights include:

- Community Workforce Services – Services continue to be successful across the seven (7) community workforce grantees. The technical assistance provider, TAD Grants, provided an all-day, in-person training in April with grantees focused on sustainability.
- Industry-Based Job Training – Activities in each of the identified industries and projects have commenced for this ARPA contract. Current project progress includes:
 - Industry Credentials – The Industry and Training Relations Team is partnering with the Fairfield-Suisun Adult School to offer the forklift certification workshop serving up to 12 participants. By popular demand, one more Food Manager Certification will probably be scheduled in either Vacaville or Rio Vista. 129 industry recognized credentials have been attained to date.
 - BuildEd Entrepreneurship Workshops – Participation is on rise for the 21st Century Entrepreneurship workshops. Industry and Training Relations Manager, Cynthia Seals-Roper, collaborated with the Fairfield Suisun Adult School to host an in-person session for students, many without the digital tools to participate. She is also working with Touro University to offer an in-person session for students. The JSS Unit is having in-coming participants complete the workshop prior to participation in training or job search activities to help bring the client up to speed with re-entering employment.
 - Childcare Entrepreneurship Bootcamp – The Childcare Cohort is wrapping up and 47 participants have completed the cohort training to date. Of those, 29 participants have obtained their license to operate a childcare center, and 18 participants are in the process of obtaining a childcare license.
 - Solano Community College Healthcare Partnership – In partnership with the Solano College Nursing Program, 18 students are being assisted with the cost of the NCLEX nursing application and exam fees. To date, 16 students have obtained their Nursing License and 8 are currently working as a Registered Nurse. Staff are also working with the EMT Program. To date, 10 EMT students are being supported with the cost of exam fees and 3 students are currently awaiting exams.
 - Solano Community College Biomanufacturing Partnership – In partnership with the Solano Community College Biomanufacturing Program, 3 students are being assisted with certification costs to obtain the Certified Associate in Project Management (CAPM).
 - Working Waterfront Coalition – Staff participated in outreach and selection processes with the Working Waterfront Coalition to provide Solano County residents with Career Pathways into the Marine Trades. The first training cohort started September 9, 2024 at Mare Island Shipyard with 6 Solano County residents selected to participate.

- Climate Summer Youth Programming – The Climate Transition Summer Youth Program completed its second season in August 2024. Of the 12 young adults who started the program, 12 finished. The participants worked in a variety of settings in Solano County and participated in projects that included installing irrigation, removing invasive plant species, erosion protection and tree planting.
- Employee Resource Network – WDB staff and the Employee Resource Network USA are currently working with 6 businesses to begin planning for the ERN launch. WDB staff and the businesses met on August 21, 2024. During that session, Business Services staff, the ERN representative and the businesses decided to meet on a monthly bases to build the network so we can launch the first cohort of business by early 2025.
- Small Business Programs – The ARPA small business projects are continuing to make an impact on the county’s small businesses. Current project progress includes:
 - CEA Employer Workshop Series – CEA continues to offer no-cost employer workshops on a monthly schedule through the end of September 2024. These workshops have been focusing on information and solutions to common business issues around talent. In addition to the monthly workshops, the second 6-week LEAD certification started on August 6, 2024. CEA reported that over 30 participants started from various Solano County employers.

Small Business Development Center (SBDC)

The WDB is the host for the Solano Small Business Development Center (SBDC). Services for small businesses include one-on-one business advising through expert consultants and seminars and events for small businesses throughout the county.

Reporting period highlights include:

- Solano Biz Grow Revolving Loan Fund – The SBDC was recently recognized at an event by the Solano EDC for supporting the ARPA Revolving Loan Fund that provides up to \$100,000 in loans to small and underserved businesses with credit scores as low as 630.

About half of the \$4M in funds have been loaned out and we will be supporting another re-start of this program through the end of 2024. Staff role is to work with the loan applicants at the front end to assess their credit worthiness and provide them with technical assistance to support the success of their business.

- LaunchPad Event – Staff are working to put together an all-day live event in Vacaville on November 20th held at Travis Credit Union. Training topics will include: how small businesses can leverage AI, an introduction to Strengths, a special presentation from Google on how to leverage their platform to reach more customers, and an access to capital event with several traditional and non-traditional lenders.

PY 23/24 Job Seeker Deliverables by Grant Funded Program

Reporting Period: July 2023 to June 2024

WIOA Adult/DW	Goal	July	August	September	October	November	December	January	February	March	April	May	June	YTD	On Target
Applications*	250	13	20	9	13	20	10	27	20	17	11	13	10	183	73%
Newly Enrolled*	150	12	17	18	7	13	19	16	24	19	13	13	12	183	122%
Occupational Training*	63	13	1	1	1	5	3	10	7	3	4	2	5	55	87%
Employer-Based*	8	0	0	0	1	1	0	0	6	9	16	3	9	45	563%
Credentials*	53	6	10	3	0	1	1	4	1	2	0	1	0	29	55%
MSG*	44	14	4	3	9	5	5	5	1	4	1	2	1	54	123%
Exited*	81	4	10	15	5	12	4	7	2	7	4	2	4	76	94%
Employed At Exit*	48	4	6	11	9	8	2	3	3	8	3	3	1	61	127%
Average Wage *	\$ 28.00	\$ 26.00	\$ 24.16	\$ 26.62	\$ 22.32	\$ 25.40	\$ 23.10	\$ 32.82	\$ 32.36	\$ 24.00	\$ 26.50	-	-	\$ 26.33	94%

* May represent co-enrolled participant

WIOA Youth	Goal	July	August	September	October	November	December	January	February	March	April	May	June	YTD	On Target
Application	50	0	0	2	2	1	0	2	0	8	3	0	1	19	38%
Enrolled	22	23*	2	1	1	2	1	0	2	0	10	0	1	20	91%
Occupational Training	8	4	1	0	1	0	0	5	2	0	1	0	1	15	188%
Employer-Based	9	1	1	7	5	0	0	4	1	3	8	0	1	31	344%
Credentials	6	5	2	0	0	2	0	1	0	0	0	1	0	11	183%
MSG	5	1	2	0	0	2	2	4	1	3	8	0	2	25	500%
Exited	15	0	3	1	0	1	0	1	1	3	2	1	0	13	87%
Employed At Exit	7	0	1	0	0	1	0	0	0	1	0	0	0	3	43%
Median Wage	\$ 20.00	-	\$ 25.88	-	-	\$ 18.50	-	-	-	\$ 16.85	-	-	-	\$ 20.41	102%

*July includes carry-over numbers from PY 2022-2023 of 22 participants

CNA	Goal	July	August	September	October	November	December	January	February	March	April	May	June	YTD	On Target
Enrolled	70	10	0	0	1	0	12	1	0	0	0	0	0	24	34%
Employer-Based	80	10	0	0	1	0	21	1	0	0	0	0	0	33	41%
Credentials	35	8	0	2	0	0	0	0	0	0	0	11	0	21	60%
MSG	60	8	0	2	0	0	0	0	0	0	0	0	0	10	17%
Exited	40	9	0	2	0	0	0	11	8	2	0	0	0	32	80%
Employed At Exit	35	8	0	2	0	0	0	0	0	0	0	0	0	10	29%
Median Wage	\$ 27.00	\$25.36	-	\$26.94	-	-	-	-	-	-	-	-	-	\$ 26.15	97%

ARPA #1 (WDB Training)	Goal	July	August	September	October	November	December	January	February	March	April	May	June	YTD	On Target
Enrolled	N/A	17	10	16	11	13	12	17	23	16	26	13	12	186	n/a
Training (Occ / WBL)	50	5	14	13	2	3	0	0	16	0	0	0	25	78	156%
Completed Training	N/A	2	3	1	1	2	0	0	2	0	0	0	20	31	n/a
Exited	80	3	7	8	4	8	6	2	1	4	3	4	2	52	65%
Employed At Exit	60	7	7	12	10	11	3	1	2	4	4	8	4	73	122%
Median Wage	\$ 27.00	\$ 21.00	\$24.67	\$22.05	\$21.67	\$21.67	\$21.67	\$ 32.21	\$ 39.48	\$ 27.00	\$ 26.75	\$ 24.94	\$ 24.71	\$ 25.65	95%

Key
 => 100.0% of Goal
 <> 80% - 100% of Goal
 < 80% of Goal

PY 24/25 Job Seeker Deliverables by Grant Funded Program

Reporting Period: July - August 2024

8.3%

WIOA Adult/DW	Goal	July	August	September	October	November	December	January	February	March	April	May	June	YTD	On Target
Applications*	185	14	3											17	9%
Newly Enrolled*	150	10	15											25	17%
Occupational Training*	92	10	12											22	24%
Employer-Based*	8	5	4											9	113%
Credentials*	66	0	2											2	3%
MSG*	50	0	5											5	10%
Exited*	86	6	2											8	9%
Employed At Exit*	60	8	2											10	17%
Average Wage*	\$ 30.00	\$ 33.00	-											\$ 33.00	110%

* May represent co-enrolled participant

WIOA Youth	Goal	July	August	September	October	November	December	January	February	March	April	May	June	YTD	On Target
Application	60	1	0											1	2%
Enrolled	45	34	1											35	78%
Occupational Training	35	1	0											1	3%
Employer-Based	10	0	0											0	0%
Credentials	6	0	0											0	0%
MSG	5	0	0											0	0%
Exited	25	0	0											0	0%
Employed At Exit	14	0	0											0	0%
Median Wage	\$ 21.00	-	-											-	0%

*July includes carry-over numbers from PY 2023-2024 of 34 participants

ARPA #1 (WDB Training)	Goal	July	August	September	October	November	December	January	February	March	April	May	June	YTD	On Target
Enrolled	N/A	0	6											6	0%
Training (Occ / WBL)	27	39												39	144%
Completed Training	22	11												11	0%
Exited	18	8	2											10	56%
Employed At Exit	14	4	0											4	29%
Median Wage	\$ 28.00	\$ 32.00	-											\$ 32.00	114%

Key

- => 100% of Goal
- <> 80% - 100% of Goal
- < 80% of Goal

August SBDC Monthly Report

Key Performance Indicators	Annual Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD	%Goal
Total client sessions 2024 YTD	2,200	295	309	378	302	320	273	348	306					2531	115%
Total Client Hours YTD	3,000	392.75	451.25	522.75	402.17	433	328.5	462.5	414.5					3407.42	114%
Total Active Clients (Napa)	530	505	507	511	514	497	490	489	462					462	87%
Total Active Clients (Solano)	1,450	1423	1430	1438	1547	1499	1424	1432	1431					1431	99%
Total Active Clients (Center)	1,980	1965	1972	1949	2061	1946	1946	1960	1932					1932	98%
Jobs Created	237	0	22	37	28	5	26	15	73					206	87%
New Business Starts	32	1	7	17	8	0	0	0	3					36	113%
Change in Sales	\$ 19,700,000.00	\$ 9,600.00	\$ 9,068,150.00	\$ 482,999.00	\$ 1,505,026.00	\$ 1,020,932.00	\$ 282,370.00	\$ 4,240,097.00	\$ -					\$ 16,609,174.00	84%
Dollar amt of loans/equity	\$ 16,876,000.00	\$ 332,500.00	\$ 537,910.00	\$ 22,608,300.00	\$ 2,815,648.19	\$ 269,247.00	\$ 16,589,970.00	\$ 207,000.00	\$ 128,457.00					\$ 43,189,032.19	256%
Training Sessions held	72	16	17	21	20	22	15	19	14					144	200%
# of attendees	900	234	262	287	350	364	256	229	171					2153	239%

Focus Areas:

Mtg with Napa BOD re new accel prog
 Planning for LaunchPad II Nov 19-20
 Planning for Napa ED forecast & access to capital

ACTION ITEMS





WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

AGENDA SUBMITTAL

SUBJECT Acceptance of Board Nomination, Thomas Stuebner, and Election to Fulfill the 2024-2026 Board Treasurer Seat	MEETING DATE September 20, 2024	AGENDA ITEM X.A
FROM Heather Henry, President/Executive Director	ACTION REQUIRED YES ✓ NO	ATTACHMENTS NONE

RECOMMENDATION

It is the recommendation of staff that the Board consider and elect the following candidate to serve as the Workforce Development Board (WDB) of Solano County’s Treasurer for the remainder of the two-year term of office beginning on October 1, 2024, through June 30, 2026. All other officer seats were appointed at the July 19, 2024 Board meeting.

Nominated Treasurer

Office	Nominee	Representative Category
Treasurer	Thomas Stuebner	Community Workforce

DISCUSSION

At the May 17, 2024 Board Meeting, the WDB Chair, Mr. Chris Churchill, appointed an Ad-Hoc Nominations Committee that consisted of Mario DeWeerd, David Tam, and Mario Giuliani. Staff sent an email to all members of the Board on June 11, 2024 asking if anyone was interested in serving as an officer and would like to be considered OR would like to nominate another Board member. Staff requested notification by June 28, 2024; one member interested in being considered for Member-at-Large was received. Current officers were polled to see if they would be interested in serving an additional two-year term. During those conversations, Chair Chris Churchill, Vice-Chair Shannon Dodds and Secretary Chris Huxsoll expressed interest in serving another two-year term. Mario Giuliani, declined to continue as Treasurer and Member-at-Large, Mary Dugbartey expressed her willingness to resign should another member be interested in being nominated.

At the May 17, 2024, Board meeting, staff recommended extending the terms of the current Slate of Officers through July 31, 2024. This extension would allow staff the time to ask members if anyone was interested in serving as an officer and would like to be considered OR would like to nominate another Board member. This would also allow time for the Ad-Hoc Nominations Committee to meet prior to the July Board meeting. This action was approved by the Board.

On July 2, 2024, the Ad-Hoc Committee met via Zoom to discuss the upcoming elections and review nominations. With the direction of the committee, staff reached out to members as potential successors for Treasurer who requested additional time to consider. Mr. Giuliani agreed to continue as Board Treasurer through September 30, 2024 to finalize a new candidate for Treasurer.

At the July 19, 2024 Board meeting, members elected the Slate of Officers for a two-year term beginning August 1, 2024 through June 30, 2026, understanding Mr. Guiliana's appointment as Treasurer would end September 30, 2024.

After additional discussion and consideration, Mr. Stuebner has accepted the nomination as Treasurer.

ALTERNATIVES

Board members could choose to not accept the nomination of Treasurer; however, this would create the need to identify a new nominee and vote accordingly.

REPORT PREPARED BY

Tammy Gallentine, Executive & Board Support Specialist. Please contact Tammy at 707-863-3552 if you have any questions regarding the information outlined in this report.



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

AGENDA SUBMITTAL

SUBJECT Approval of the WIOA Adult and Dislocated Worker Enrollment and Eligibility Policy	MEETING DATE September 20, 2024	AGENDA ITEM X.B
FROM Heather Henry, President/Executive Director	ACTION REQUIRED YES ✓ NO	ATTACHMENTS A

RECOMMENDATION:

Staff and the Planning and Oversight Committee are recommending the Board approve the revised Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker Eligibility and Enrollment Policy.

DISCUSSION:

The policy on WIOA Adult and Dislocated Worker eligibility and enrollment provides guidelines to the WIOA staff with respect to the eligibility requirements for Adult and Dislocated Worker enrollment, as well as the requirements within the enrollment process. Revisions to the Adult and Dislocated Worker Eligibility and Enrollment policy include changes made at the federal and state level, as well as local determination additions. Per WIOA guidelines, certain elements around eligibility must be outlined in local policy.

Overview of Policy Revisions

Department of Labor (DOL) has put out recent guidance outlining their goal to reduce the administrative burden of eligibility documentation for job seekers to enroll into WIOA services. Revisions to the policy include changes to documentation requirements for each element based on new federal and state guidance.

Both federal and state guidelines have shifted to provide the ability to serve individuals without having all of the eligibility documentation. Policy changes address this shift.

Federal guidelines have also initiated a target quota for priority of service populations under Adult funding. The expectation is that at least 50.1% of participants meet priority populations; the goal is at least 75%. This marks a shift for Solano’s system. In addition, this policy adds an additional priority section for locally defined priority populations.

Key Policy Revisions:

- This policy creates a local definition for basic skills deficiency to now include digital and financial literacy, as well as lack of a high school diploma
- Documentation for dislocated worker status can now include Employment Development Department (EDD) documentation of attendance or appointment for Unemployment Insurance (UI) Profiling workshops

- Self-employed can now be considered eligible for WIOA adult services if they meet the definition of “underemployed.”
- Replaced federal “deficit-based” language for targeted populations with locally-used terms. Federal “offender” term was replaced with “justice involved.” Federal “homeless” term was replaced with “unhoused.”
- Revisions include allowability standards for providing services prior to an individual being able to produce their right to work documentation.

This policy outlines guidance from Department of Labor (DOL) regarding target quotas for serving individuals from the WIOA-defined priority populations. In addition, this policy identifies locally-defined priority populations as:

- Individuals over the age of 55
- Individuals with a disability
- Justice-involved individuals, current or previous involvement
- Long-term unemployed
- Single parents
- Transgender and gender non-conforming

ALTERNATIVES

The Board could choose not to approve this policy and direct staff on further information needed before approving the policy.

REPORT PREPARED BY

Heather Henry, President/Executive Director. Please contact Heather at 707-863-3501 if you have any questions regarding the information in this report.



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

POLICY ISSUANCE

Date: September 20, 2024

Number: 2024-01

WIOA ADULT AND DISLOCATED WORKER ELIGIBILITY AND ENROLLMENT POLICY

INTRODUCTION

The Workforce Innovation and Opportunity Act (WIOA) provides resources, services, and leadership tools for the workforce system to help individuals find and maintain good jobs and improve employer prospects for success in the global marketplace. As stated in WIOA, a primary goal of public workforce programs is to help people (especially those facing employment challenges) gain access to jobs, education, training, and support services needed to succeed in the labor market.

WIOA Title I provides authority for three programs: Adult, Dislocated Worker, and Youth programs. This policy defines WIOA Adult and Dislocated Worker eligibility and provides guidelines to ensure that every participant who receives WIOA Program-funded services is eligible and registered to receive those services.

Enrollment in WIOA Individualized Career Services is provided after staff determine that such services are required to retain or obtain employment. Staff may use recent previous interviews, evaluations, or assessments by partner programs to determine if individual career services would be appropriate. Individualized career services include specialized assessments, developing an individual employment plan, career counseling, training services, work experiences, and more. Assessments to be used in determining eligibility can be found in the Workforce Development Board (WDB) of Solano's [Assessment Policy](#).

QUESTIONS

Questions relating to this policy should be directed to the Tracy White, One-Stop Manager, at twhite@solanowdb.org or at 707.863.3520.

ATTACHMENTS

- Attachment A: Eligibility Checklist for WIOA Adult Programs
- Attachment B: Allowable Eligibility and Data Verification Sources
- Attachment C: Definitions of Key Terms
- Attachment D: Policy Acknowledgement Page

RESCISSIONS

This policy replaces and supersedes *WDB 2018-16 – WIOA Adult and Dislocated Worker Enrollment and Eligibility Policy*.

GENERAL WIOA ELIGIBILITY GUIDELINES

To participate in the WIOA Adult or Dislocated Worker program, an individual must meet basic eligibility requirements as defined by federal mandate, California Unemployment Insurance Code Section 9601.5, and the local plan to participate in WIOA adult programs. An individual who uses WIOA self-services or receives information-only services does not need to meet WIOA eligibility requirements.

To be eligible for WIOA Adult or Dislocated Worker funding, an individual must:

- be 18 years of age or older;
- be authorized to work in the U.S. before completing services; **and**
- meet Military Selective Service registration requirements, if applicable.

WIOA is not considered an entitlement program, meaning that although an individual might meet eligibility criteria, it does not mean they are guaranteed services, particularly within the WIOA Adult program. Program staff may consider the individual's need, the participant's ability to benefit, and program specific requirements in determination of program eligibility.

Solano County residents receive priority for enrollment into WIOA programs, with the exception of employer-based trainings and Rapid Response enrollments, whose enrollment may be based on the location of the business. Non-Solano County residents may be enrolled on a case-by-case if approved by a WIOA Program Manager. Enrollment of non-Solano County residents may require coordination with the WIOA provider of residency.

Underemployed individuals are eligible to receive employment and training services under WIOA as either Adult or Dislocated Workers per guidance below.

Additional eligibility or priority of service requirements apply depending on the WIOA funding source.

Authorization to Work Documentation

WIOA services that are not considered "federal public benefits" may be delivered to program-eligible participants without proof of work authorization. This can be helpful in many situations, including where workers are awaiting work authorization, already have work authorization but do not have the documents to demonstrate it due to surviving a disaster, recently returning from incarceration, experiencing homelessness, leaving foster care, moving to a new location, or otherwise lacking full access to a vital document. (*Note: Staff do not need to verify that one of these scenarios occurred.*)

The following services may be provided to eligible individuals with and without verifying work authorization:

- Labor exchange services such as labor market information, career exploration, career guidance, resume writing assistance, and job search assistance;
- Information on worker rights and where to find legal assistance;
- Referrals to community resources that can provide supportive services and other similar resources;
- Individualized services such as career assessments, development of an individual employment plan, group counseling, one-on-one case management, career planning, information on foreign credential evaluation services and on obtaining credit for prior learning;
- Basic skills education, including English language instruction and high school equivalency;
- Assistance in completing paperwork to finalize work authorization; and
- Assistance in applying for an occupational license, including the cost of such applications.

Staff can improve the customer experience by reducing administrative burden for individuals (particularly those who have historically been underserved) by helping them obtain necessary documents for employment, such as a driver's license or identification card, a social security card, and/or a birth certificate.

The following services may **not** be provided without verification of work authorization documentation:

- Job placement,
- Supportive services that represent a direct financial benefit such as a voucher or reimbursement, relocation expenses, or needs-related payments,
- Occupational post-secondary education or training, or
- Work-based learning such as on-the-job training and incumbent worker training.

Selective Service Requirements

The law requires males born on or after January 1, 1960 and residing in the U.S. to register with Selective Service within 30 days of their 18th birthday. For WIOA eligibility, every applicable male must be registered with the Selective Service. Selective service documentation, if applicable, must be verified prior to enrollment in WIOA programs.

This includes males who are:

- Citizens of the U.S.;
- Non-US citizens, including undocumented immigrants, legal permanent residents, and refugees, who take up residency in the U.S. before their 26th birthday;
- Veterans discharged before their 26th birthday; **and/or**
- Dual nationals of the U.S. and another country regardless of whether they live in the U.S.

For U.S. citizens, Selective Service registration is not required for:

- Men who are serving in the military on full-time active duty;
- Men attending the service academies;
- Male veterans discharged after their 26th birthday;
- Disabled men who are continually confined to a residence, hospital or institution; **and/or**
- Men who are hospitalized, institutionalized, or incarcerated are not required to register during their confinement; however, they must register within 30 days after being released if they have not yet reached their 26th birthday.

For non-U.S. citizens, Selective Service registration is not required for:

- Non-U.S. males who came into the U.S. for the first time after their 26th birthday;
- Non-U.S. males who entered the U.S. illegally after their 26th birthday. He must provide proof that he was not living in the U.S. from age 18 through 25; **and/or**
- Non-U.S. males who have a valid non-immigrant visa.

Before being enrolled in WIOA Title I-funded services, all required males who have not registered with the Selective Service and have not yet reached their 26th birthday must register through the Selective Service website at www.sss.gov. If a man under the age of 26 refuses to register with the Selective Service, WIOA Title I-funded services must be suspended until he registers.

For individuals who did not register for Selective Service by their 26th birthday and who believe they were exempt from registering, they may receive a Selective Services System Status Information Letter (SIL) on the Selective Service website (along with a list of acceptable documentation) at <https://www.sss.gov/verify/sil/>.

If a male over 26 that was required to register failed to register, the WDB's local policy is to evaluate whether their failure to register was knowing and willful via a Self-Attestation Statement.

Individuals who are born female and changed their gender to male are not required to register. Individuals who are born male and changed their gender to female are still required to register.

WIOA ADULT ELIBILITY

WIOA Adult programs are open to any individual that meets general WIOA eligibility criteria. However, while recognizing the needs of all participants, the WIOA Adult program is focused on assisting those most in need and helping to place them on paths to self-sufficiency.

As such, individualized career services and training services under WIOA Adult funding must be given on a priority basis, regardless of funding levels, as outlined in WIOA Sec. 134(c)(3)(E) and Sec. 133(b)(2)(A). The WDB will ensure that participants in the WIOA

Adult program meet the federal, state, and local priority of service guidelines, so that the targeted Adult populations can access the WIOA system on a priority basis.

Priority of service means that an individual who meets established criteria must be given priority in the program over other individuals. The Department of Labor (DOL) expects that at least 50.1% of Adult enrollments are from one of the WIOA-defined priority populations, and envisions that priority populations are 75% of Adult enrollments.

Federal WIOA law has identified the following as Adult priority of service populations:

- public assistance recipients,
- low-income adults; **and/or**
- individuals who are basic skills deficient.

The California and Solano workforce boards have identified the populations below as additional priority groups based on local analysis of economic and State or county conditions. These identified priority populations are not to be interpreted as additional eligibility criteria.

- Individuals over the age of 55 (locally-defined)
- Individuals with a disability (locally-defined)
- Justice-involved individuals, current or previous involvement (locally-defined)
- Long-term unemployed (locally-defined)
- Single parents (locally-defined)
- Transgender and gender non-conforming (state-defined)

Although not relevant for the 50.1% minimum benchmark, State or local priority populations will be considered when calculating progress towards the 75% priority of service benchmark.

Written copies of the above local priority of service populations must be available at all service delivery locations and, to the extent practicable, posted in a way that makes it possible for members of the general public to easily access the information.

Priority of service status is established at the time of eligibility determination and does not change during the period of participation. For the purposes of program eligibility, priority of service will be implemented through priority of intake and enrollment. Out of a group of individuals who have applied for WIOA enrollment, individuals who are eligible for first priority must be served and processed first, followed by individuals who are eligible for second priority, and so forth. In addition, targeted programs and initiatives operated through WIOA Adult funding may be focused on priority populations where feasible.

Priority of service under the WIOA Adult program will be given in the following order:

1st Priority	Veterans and eligible spouses who are also low-income, recipients of public assistance, and/or basic skills deficient (including English language learners)
2nd Priority	Individuals who are not veterans / eligible spouses but are recipients of public assistance, other low-income individuals, and/or individuals who are basic skills deficient (including English language learners)
3rd Priority	Veterans and eligible spouses who are not included in WIOA's priority groups
4th Priority	Individuals who are neither veterans / eligible spouses nor meet criteria to be considered part of a federal WIOA priority group, but are a member of a local priority group
5th Priority	All other individuals who do not meet the above priorities

Any barriers identified for priority of service purposes must be verified through allowable documentation outlined in Attachment B.

For employed individuals seeking WIOA Adult-funded services, employment status must meet one of the following criteria to be enrolled:

1. Less than full-time if the individual desires full-time employment,
2. A position that is inadequate with respect to their skills and training, **or**
3. Wages are below the self-sufficiency standard or are less than 80% of previous wages.

Self-employed individuals can be considered underemployed if their employment meets the above criteria; therefore, they can be served in the Adult program.

Individuals who are underemployed and meet the definition of a low-income individual or other state-identified barrier may receive career and training services under the Adult program on a priority basis.

Receives Public Assistance Priority Population

Public assistance recipients are one of the federally-identified priority populations under WIOA Adult. To be considered a public assistance recipient, the individual must receive (or is a member of a family that receives), currently or in the past six (6) months, one of the following public benefits:

- Supplemental Nutrition Assistance Program (SNAP), also called CalFresh in California;
- Temporary Assistance for Needy Families (TANF), also called CalWORKS in California;
- Supplemental Security Income (SSI); or
- Other State or local income-based public assistance.

Low-Income Status Priority Population

Low-income adults are one of the federally-identified priority populations under WIOA Adult. Staff must determine an individual's family size before making a low-income determination, since income status is based on total family income.

If an individual is unhoused (called "homeless" in WIOA legislation), they are automatically determined to meet the low-income definition and may be counted as a low-income adult for priority of service purposes. If an individual with a disability's total family income is over the low-income threshold, but their individual income level is below the low-income threshold, then they may be counted as a low-income adult for priority of service purposes.

WIOA regulations state that a low-income adult is considered an individual who is in a family with a total family income that does not exceed the higher of the following:

- The federal poverty line, or
- Seventy percent (70%) of the Lower Living Standard Income Level (LLSIL)

Only income received during the six-month period immediately prior to the individual's application for WIOA is used for income determination. Eligibility is determined based on the *Lower Living Standard Income Level (LLSIL) and Poverty Guidelines Policy* approved for the program year of eligibility.

A income worksheet may be used as a Self-Attestation Statement if signed. Individuals should outline the sources and amount of family income for the six (6) month-period prior to application.

The following income sources should be included in an individual's income calculation:

- Alimony, military family allotments, or other regular support from an absent family member or someone not living in the household;
- Child support payments (including foster care child payments);
- College or university scholarships (not needs-based), grants, fellowships, and assistantships;
- Monetary compensation for services, including wages, tips, salary commissions, or fees before any deductions;
- Net gambling or lottery winnings;
- Net receipts from farm self-employment (receipts from a farm which one operates as an owner, renter, or sharecropper, after deductions for farm operating expenses);
- Net receipts from non-farm self-employment (receipts from a person's own unincorporated business, professional enterprise, or partnership, after deductions for business expense);
- Private pensions, government employee pensions (including military retirement pay);
- Regular insurance or annuity payments (including state disability insurance);

- Regular payments from railroad retirement, strike benefits from union funds, worker's compensation, and training stipends (e.g., wages from the California Conservation Corp);
- Severance payments;
- Social Security Disability Insurance payments;
- Social Security old age and survivors' insurance benefit payments;
- Terminal leave pay; **and**
- Unemployment insurance compensation.

The following income sources should not be included in an individual's income calculation:

- Need-based public assistance payments (including Temporary Assistance for Needy Families, supplemental security income, emergency assistance money payments, and non-federally-funded general assistance or general relief money payments);
- Financial assistance under Title IV of the Higher Education Act, i.e., Pell Grants;
- Supplemental Educational Opportunity Grants and Federal Work Study;
- Needs-based scholarship assistance;
- Loans;
- Veterans benefits outlined in further detail below;
- Military pay or allowances earned while the veteran was on active military duty and certain other veterans' benefits (i.e., compensation for service-connected disability, compensation for service-connected death, vocational rehabilitation, and education assistance);
- Capital gains;
- Any assets drawn down as withdrawals from a bank, such as the sale of property, a house or a car;
- Tax refunds, gifts, loans, lump-sum inheritances, one-time insurance payments, or compensation for injury;
- Non-cash benefits such as employer paid or union-paid portion of health insurance or other fringe benefits, food or housing received in lieu of wages;
- The value of food and fuel produced and consumed on farms;
- The imputed value of rent from owner occupied nonfarm or farm housing;
- Medicare, Medicaid, food stamps, school meals, and housing assistance;
- Allowances, earnings and payments to individuals participating in programs under WIOA (except on-the-job training wages); nor
- Income excluded in determining eligibility as defined in other federal programs.

Methods for calculating income must be outlined in procedural documents.

Basic Skills Deficiency Priority Population

Individuals who need to improve their basic literacy or English language skills, or are otherwise determined to be deficient in basic skills, are considered a federally-identified priority population under WIOA Adult.

Basic skills include the ability to compute or solve problems; or read, write, or speak English at a level necessary to function on the job, in the individual's family, or in society.

Basic academic or English skills are documented through:

- Enrollment in a Title II Basic Adult Education or English Language Learner program;
- An assessment of skills using an approved State test that show English, reading, writing, or computing skills at a grade level of 8.9 or below; or
- Staff-documented observations of limited English language proficiency.

English language learners must also document that their native language is a language other than English, or that they live in a family or community environment where a language other than English is the dominant language. This may be validated through Self-Attestation or a signed WIOA program application or enrollment form.

The WIOA and DOL regulations do not further define the level of literacy “necessary to function on the job, in the individual's family, or in society.” The WDB locally defines basic skills deficiency to include stated or assessed survival skills, including but not limited to: computer (or digital literacy) skills and financial literacy skills. It is recognized that employers often consider a high school diploma as a basic literacy level; as such, the WDB includes a lack of a high school diploma within the definition of basic skills deficiency.

WIOA DISLOCATED WORKER ELIGIBILITY

The WIOA Dislocated Worker program offers employment and training services for eligible workers who are unemployed through no fault of their own or who have received an official layoff notice.

To be eligible to receive WIOA services as a dislocated worker as defined in WIOA Sec. 3(15), an individual must meet at least one of the six criteria below. For each Dislocated Worker eligibility criteria, documentation must be provided to verify every required element.

1. *General Dislocation* – The individual must meet **all** three criteria below:
 - has been terminated or laid off, or has received a notice of termination or layoff, from employment;
 - meet one of the following:
 - is eligible for or has exhausted entitlement to unemployment compensation, or

- has been employed for a duration sufficient to demonstrate attachment to the workforce (defined by the State as at least three consecutive months in the last twelve-month period), but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a state's Unemployment Insurance law; **and**
- Is "unlikely to return to a previous industry or occupation."

The Governor of California has determined that California's Unemployment Insurance (UI) profiling methodology and referral process meets this dislocated worker eligibility criteria. Therefore, if an individual receives a RESEA appointment, then no further documentation is needed to establish these criteria.

2. *Dislocation from Facility Closure* – The individual must meet **one** of the following criteria:
 - has been terminated or laid off, or has received a notice of termination or layoff, from employment as a result of any permanent closure of, or any substantial layoff at, a plant, facility, or enterprise; **or**
 - is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days.
3. *Self-Employment Dislocation* – The individual was self-employed (including employment as a farmer, rancher, fisherman, independent contractor, or consultant) but is unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters.
4. *Displaced Homemaker* – The individual as defined in WIOA Sec. 3(16) was providing unpaid services to family members in the home, is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment, and:
 - has been dependent on the income of another family member but is no longer supported by that income; **or**
 - is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the member.
5. *Separating Military Service Members* – The individual is a separating or separated service member with a discharge other than dishonorable, who has received a notice of separation from the Department of Defense within 48 months of WIOA application. The DD-214 satisfies documentation of dislocated worker status, including "unlikely to return to a previous industry or occupation."

6. *Dislocated Spouse of a Military Service Member* – The individual is the spouse of a member of the Armed Forces on active duty as defined in Sect. 10(d)(1) of Title 10, U.S. Code, and who:
- has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such members; **or**
 - is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

For employed individuals seeking WIOA Dislocated Worker-funded services, employment must meet **one** of the following two criteria:

1. Employment is “interim,” identified as:
 - Employment less than full-time if the individual desires full-time employment,
 - Short-term contract-based employment, **or**
 - Employment through a temporary or staffing agency.
2. Employment is at a level below the self-sufficiency standard or below a level commensurate with previous experience, identified as:
 - A level not commensurate with the individual’s demonstrated level of education and/or skill achievement,
 - A wage that is less than the self-sufficiency standard, **or**
 - Current job earnings that are less than 80% of their previous job earnings.

Workers who have received a notice of layoff, but who have not yet been laid off and have no other sources of employment are not subject to a review of underemployment status.

VETERAN PRIORITY OF SERVICE

The Jobs for Veterans Act (JVA) of 2002 and the Veterans’ Benefits, Health Care, and Information Technology Act of 2006 provides that covered veterans and eligible spouses receive “Priority of Service.” Staff must give first consideration for program participation to covered veterans and eligible spouses who meet the eligibility criteria of a U.S. DOL training, employment, or placement service in any workforce preparation program.

Veterans’ priority is required under federal law; however, it is not intended to displace existing eligibility requirements for WIOA. An individual must first qualify for WIOA before a priority of service can be applied. Staff must use the following guidelines when determining priority for DOL-funded services:

- If the existing provisions are mandatory, a veteran must meet both the existing provisions and the veterans’ provisions to receive priority. A non-veteran receives priority over a veteran who does not meet the mandatory provisions.
- If the existing provisions are optional, a veteran receives priority.

At the point of entry, staff will inform covered persons that by identifying as a veteran or an eligible spouse, they are entitled to Priority of Service. In addition, staff must inform covered persons of the full array of employment training and placement services available, as well as the applicable eligibility requirements for programs and services.

Verifying Veteran Status

Any individual self-identifying as a covered person should be provided immediate priority in the delivery of employment and training services. No covered person should be denied access on a priority basis to any services provided by program staff in order to verify covered person status.

It is neither necessary nor appropriate for any staff to require verification of the status of a veteran or eligible spouse at the point of entry, unless the individual who self-identifies as a covered veteran or eligible spouse:

1. Is to immediately undergo eligibility determination and must be registered or enrolled in a program; **or**
2. The applicable federal program rules require verification of covered Veteran or eligible spouse status at that time.

When a veteran does not have verifying documentation of veteran or eligible veteran status, the veteran or eligible spouse should be enrolled (providing other required documentation is provided) and provided immediate priority. They should be permitted to follow-up subsequently with any required verification of covered status. To receive training services under WIOA, veteran status must be verified.

Processes to identify veterans and eligible spouses who access service delivery points and inform veterans and eligible spouses of their priority of service must be outlined in procedural documents.

Exemption of Military Service-Related Income

Many types of income related to military service should not be included when determining if a veteran or eligible spouse meets “low income” eligibility standards.

Forms of exempted military service-related income per Title 38 U.S.C. 4213:

- Pay and/or financial allowances earned while a veteran was on active duty
- Any financial benefits received by a covered person under the following Chapters of Title 38 of the U.S. Code:
 - 11. Compensation for service-connected disability or death
 - 13. Dependency and indemnity compensation for service-connected deaths
 - 30. All-volunteer force educational assistance program
 - 31. Training and rehabilitation for veterans with service-connected disabilities
 - 35. Survivors’ and dependents’ educational assistance

- 36. Administration of educational benefits
- Benefits received under Chapter 106 of Title 10 U.S. Code, Educational assistance for members of the selected reserve

Pension payments authorized by Title 10 U.S. Code, such as those received by military retirees whether or not their retirement was based on disability, are not exempt and are to be included in “low income” calculations. Also, pension benefits paid are not exempt under Chapter 15 of Title 38 U.S. Code.

Veterans Assistance (VA) benefits for education and training services do not constitute “other grant assistance” under WIOA’s eligibility requirements.

CO-ENROLLMENT IN WIOA CORE PROGRAMS

The WDB allows co-enrollment in youth and adult programs (Title I) and across all WIOA core programs or other grant-funded programs where appropriate. Individuals who meet the respective program eligibility requirements may participate in core WIOA programs concurrently (20 CFR 681.430). Such individuals must be eligible under the respective program’s eligibility criteria applicable to the services received.

Staff may determine, for these individuals, the appropriate level and balance of services under grant-funded programs. Staff must identify and track the funding streams which pay the costs of services provided to individuals who are participating in WIOA (or other) programs concurrently, and ensure no duplication of services. When determining in which program(s) to enroll a participant, the decision must be based on the service needs of the participant.

ELIGIBILITY VERIFICATION AND ENROLLMENT PROCESS

When registering an individual for WIOA services, staff must ensure that the individual is eligible in accordance with the eligibility requirements for WIOA (age, selective service registration, and authorization to work).

For an individual to be registered and enrolled into WIOA Adult or Dislocated Worker programs, all of the following must occur:

1. *Eligibility Determination* – Staff must collect information needed for eligibility determination. Information may be collected using several methods, including CalJOBS, personal interviews, the individual’s WIOA application, and or through assessment tools. The applicant must be informed that all information provided is subject to verification and that false information is grounds for termination and possible prosecution under the law.

U.S. DOL states processes for gathering information for eligibility determination must be done as efficiently as possible to administer important services timely. They also recognize that there may be times when the grantee can play a crucial role in helping participants obtain documentation, such as driver’s licenses or identification cards, social security cards, and/or birth certificates. In many cases,

the documentation may be gathered at later dates or be substituted with equivalently acceptable documentation. WIOA staff may also presume eligibility for individuals based on a single known characteristic, such as for unhoused individuals. Procedures should include opportunities to request documentation after intake and initial service provision.

2. The individual must be asked for Equal Opportunity (EO) data. The WIOA application or other intake forms may be used to request EO data. Staff and subrecipients must request EO data, but an individual must not be required to disclose.
3. Staff must enter a staff-assisted basic career service, individualized career service, or training service for the individual into the CalJOBS system.

Staff must maintain a secured file for each program applicant and registrant which contains copies of all documents collected. If individuals are not enrolled in WIOA, files must be maintained for at least six months and then be destroyed according to participant privacy guidelines.

There is no limit on how much time is allowed between application date and enrollment date, but enrollment should be completed within 30 days of when a participant initiates applying for WIOA enrolled services. Once the application process is started (meaning the final WIOA application is entered into CalJOBS), staff and subrecipient should obtain any required documentation, review an applicant's information, and complete WIOA enrollment within the 30-day timeframe. Otherwise, CalJOBS will automatically close the application as "closed-never enrolled."

For Adult and Dislocated Workers, enrollment (also called registration in WIOA) occurs the first day on which the individual actually begins receiving staff-assisted core, intensive, training services, or subsidized employment. The point of registration is when performance tracking and accountability begins. Enrollment in CalJOBS occurs when staff enter a participation date on the participation screen and enter the first activity code.

DOCUMENTS FOR VERIFYING WIOA ELIGIBILITY

Each file (physical or electronic) for enrolled WIOA participants must include a completed (including signed) application, equal opportunity information (which may be collected on the WIOA application or similar form), and documentation that confirms general WIOA eligibility and any additional Dislocated Worker eligibility or WIOA Adult Priority of Service data elements. All required questions on the intake form must be answered, and both the applicant and staff must sign the intake form.

A WIOA Eligibility Checklist is included in Attachment A. Required documentation sources for general WIOA eligibility are outlined in Attachment B; only one document from every applicable category must be provided. Definitions outlining eligibility categories and barriers to employment are provided in Attachment C to aid in eligibility determination.

Procedural documents must outline the process for documenting and verifying eligibility for WIOA-funded programs, using the acceptable source documentation outlined in this policy. The procedures should be customer friendly and not add to the frustrations already experienced by individuals who are out of work. It is not the intention of WIOA to discourage participation by imposing difficult documentation and verification requirements.

Use of Self-Attestation

Self-attestation is allowed as a viable source for documenting eligibility for certain WIOA Title I data elements. Self-attestation should not be the first avenue for verification of data elements but may be used if documentary evidence is not available or if it cannot be provided when time is of the essence. The WIOA Intake or Application form can also count as a self-attestation statement as long as the individual identifies his or her status for the permitted criteria and signs and dates the form attesting to this self-identification.

The applicant's difficulty in obtaining documentation does not need to entail hardship or suffering to justify using an applicant statement. In taking an applicant's statement, it is also not necessary to obtain corroboration. WDB procedures must provide guidance to case managers about how to take acceptable applicant statements.

Self-attestation statements and participant's signatures can be on paper or in CalJOBS with an electronic signature. Electronic and digital signatures may be used. An electronic submission from the participant (such as an email, text, or unique online survey response) is also considered an electronic signature or verification. Electronic submissions must be participant-generated and traceable to the participant to be considered self-attestation statements.

Staff must retain documentation of the self-attestation such as hard copies in the participant folder or in CalJOBS with a remote signature.

Self-attestation may be used as documentation for the following eligibility elements:

- Disability
- Dislocated but Ineligible to Receive UI Payments
- Dislocation from Facility Closure
- Displaced Homemaker
- English Language Learner
- Justice-Involved
- Low-income Status (with family size and income determination)
- Other Basic Skills Deficiency
- Self-Employment Dislocation
- Single Parent
- Substantial Cultural Barriers
- Underemployed at Time of Dislocation
- Unemployed or Underemployed and Experiencing Difficulty Obtaining or Upgrading Employment

- Unhoused Individual
- Unlikely to Return to Previous Industry/Occupation
- Without a High School Diploma

Documentation through WIOA Intake and Registration/self-attestation should not be overused. U.S. DOL and California’s Employment Development Department (EDD) may monitor for overuse of self-attestation when determining program eligibility. However, DOL encourages grantees to consider self-attestation as a viable alternative to source documentation, particularly for certain populations whose life circumstances may preclude immediate access to certain documents.

Case Notes

Case notes in CalJOBS or on paper by staff are allowed as a viable source for documenting eligibility for certain WIOA Title I data elements. Case notes should not be the first avenue for verification of data elements but may be used for the following eligibility elements:

- Basic Skills Deficiency
- Employed at Time of Participation
- Justice-Involved
- Layoff or Notice of Layoff (must be entered by EDD staff that verifies attendance of RESEA or PJSA)
- Unemployed at Time of Participation
- Unlikely to Return to Previous Industry or Occupation

The case note should provide an auditable trail back to the source of information verified. The case manager does not need to keep a hard copy of the information verified in the participant’s case file. Case notes must identify at a minimum:

1. A participant’s status for a specific data element,
2. The date on which the information was obtained, **and**
3. The case manager who obtained the information.

Documentation case note example: A case manager verified an individual is basic skills deficient by viewing school records, specifically, enrollment in a Title II Adult Education/Literacy program. The case notes must include auditable information, such as the name of the school and date of enrollment, which could allow an auditor/monitor to later retrieve this information. The case manager would not need to keep a hard copy of the school record in the participant’s file.

DISCLAIMER

This policy is based on WDB’s interpretation of the statute, along with the Workforce Innovation and Opportunity Act, Final Rule released by the U.S. Department of Labor, and federal and state policies relating to WIOA implementation. This policy will be reviewed and updated based on any additional federal or state guidance.

REFERENCES

Law

- [Workforce Innovation and Opportunity Act of 2014 \(WIOA\)](#).

Federal Guidance

- [WIOA Labor Only Final Rule](#): 20 CFR Part 680-681
- Training and Employment Guidance Letter WIOA (TEGL) 22-04 – [Serving Military Spouses as Dislocated Workers Under the Workforce Investment Act Dislocated Worker Formula Grant](#)
- TEGL 05-08 – [Policy for Collection and Use of Workforce System Participants' Social Security Numbers](#)
- TEGL 10-09 – [Implementing Priority of Service for Veterans and Eligible Spouses in all Qualified Job Training Programs Funded in whole or in part by the U.S. Department of Labor \(DOL\)](#)
- TEGL 11-11 and Changes 1 and 2 – [Selective Service Registration Requirements for Employment and Training Administration Funded Programs](#)
- TEGL 03-15 – [Operating Guidance for the WIOA](#)
- TEGL 19-16 – [Guidance on Services provided through the Adult and Dislocated Worker Programs under the Workforce Innovation and Opportunity Act \(WIOA\) and the Wagner-Peyser Act Employment Services \(ES\)](#)
- TEGL 7-20 – [Effective Implementation of Priority of Service Provisions for Most in Need Individuals in the Workforce Innovation and Opportunity Act \(WIOA\) Adult Program](#)
- TEGL 10-23 – [Reducing Administrative Barriers to Improve Customer Experience in Grant Programs Administered by the Employment and Training Administration](#)

State Guidance

- Workforce Service Directive (WSD) 08-14 – [Final Rule on Priority of Service for Veterans and Eligible Spouses](#)
- WSD13-11 – [CalJOBS Participant Reporting](#)
- WSD14-4 – [WIA Title I Eligibility](#)
- WSD15-14 – [WIOA Adult Program Priority of Service](#)
- WSD16-18 – [Selective Service Registration](#)
- EDD's [WIOA Title I Eligibility Technical Assistance Guide](#) (WSD TAG)

Approved by

Workforce Development Board of Solano County

**ELIGIBILITY CHECKLIST FOR
WIOA ADULT AND DISLOCATED WORKER PROGRAMS**

WIOA General Eligibility	
Requirement	Verified
Authorized to Work in the U.S.	<input type="checkbox"/>
Meets Military Selective Service Registration Requirements	<input type="checkbox"/>
Over the Age of 18	<input type="checkbox"/>

AND Complete Adult OR Dislocated Worker Table

WIOA Adult Priority of Service Populations	
First Priority	Verified
Veteran or Eligible Spouse AND	<input type="checkbox"/>
Low-Income, Recipients of Public Assistance, and/or Basic Skills Deficient	<input type="checkbox"/>
Second Priority	Verified
Low-Income, Recipients of Public Assistance, and/or Basic Skills Deficient	<input type="checkbox"/>
Third Priority	Verified
Veterans and Eligible Spouses who Does Not Meet "Second Priority" Conditions	<input type="checkbox"/>
Fourth Priority	Verified
State or local priority populations	<input type="checkbox"/>
Fifth Priority	Verified
Other Populations that Meet Basic WIOA Eligibility Requirements	<input type="checkbox"/>

WIOA Dislocated Worker	
Check One of the Following Categories	Verified
General Dislocation	<input type="checkbox"/>
Dislocation from Facility Closure	<input type="checkbox"/>
Self-Employed Dislocation	<input type="checkbox"/>
Displaced Homemaker	<input type="checkbox"/>
Dislocated / Separating Military Service Members	<input type="checkbox"/>
Dislocated Spouse of a Military Service Member	<input type="checkbox"/>

ALLOWABLE ELIGIBILITY AND DATA VERIFICATION SOURCES
WIOA Adult Programs

Note: Only the documentation sources included below are acceptable for establishing WIOA Title I eligibility. Eligibility verification is different than data element validation. Medical or disability information must be collected and stored separately.

Eligibility Criteria	References	Acceptable Documentation
General WIOA Eligibility		
Authorization to Work	<ul style="list-style-type: none"> • WIOA Section 188(a)(5) • EDD TAG 	<p>I-9 Form List A Documents:</p> <ul style="list-style-type: none"> • Employment Authorization Document with Photograph (Form I-766) • Foreign Passport and Form I-94 or I-94A with status endorsement and matching names • Foreign Passport with I-551 stamp or notation • Micronesia or Marshall Islands Passport with Form I-94 or I-94A indicating nonimmigrant admission • Permanent Resident Card or Alien Registration Receipt Card (Form I-551) • U.S. Passport or U.S. Passport Card <p>OR a Document from I-9 Form List B and C:</p> <ul style="list-style-type: none"> • List B Documents: <ul style="list-style-type: none"> ○ Driver’s License with photograph or identifying information ○ Federal, State, or Local Government ID with photograph or identifying information ○ Military Dependent’s ID Card ○ Native American Tribal Document ○ School ID card with photograph ○ Voter’s Registration Card ○ U.S. Military Card or Draft Record ○ U.S. Coast Guard Merchant Mariner Card • List C Document: <ul style="list-style-type: none"> ○ Certificate of Report of Birth issued by Department of State ○ Department of Homeland Security Employment Authorization Document ○ Native American Tribal Document ○ Original or Certified Copy of Birth Certificate Issued by a State, County, Municipal Authority or U.S. Territory with official seal ○ Resident Citizen ID Card

Eligibility Criteria	References	Acceptable Documentation
		<ul style="list-style-type: none"> ○ Social Security Account Number Card with no work restrictions ○ U.S. Citizen ID Card
<p>Birth Date/Age <i>(documentation must display individual's name and date of birth)</i></p>	<ul style="list-style-type: none"> ● 20 CFR 680.120, 681.210, & 681.220 ● EDD TAG 	<ul style="list-style-type: none"> ● Baptismal Record or Family Bible ● Birth Certificate (US or non-US issued) ● DD-214, Report of Transfer or Discharge Paper ● Driver's License ● Federal, State or Local Government Identification Card ● Hospital Record of Birth (US or non-US issued) ● Mexico Consular Identification Card (Matricula Consular) ● Passport (US or non-US issued) ● Public Assistance / Social Service Records ● School Records / Identification Card ● Tribal Records ● Work Permit
<p>Selective Service Registration <i>Required for male applicants</i></p>	<ul style="list-style-type: none"> ● WIOA Section 189(h) ● TEGL 11-11, Change 2 ● EDD TAG 	<ul style="list-style-type: none"> ● DD-214 ● Print-Out of the Selective Service Letter of Verification Site: https://sss.gov/verify ● Selective Service Telephone Verification: 1-847-688-6888 ● Registration Acknowledgement Letter or Card ● Selective Service Registration Record (Form 3A) ● Stamped Post Office Receipt of Registration
<p>Selective Service Exemption</p>	<ul style="list-style-type: none"> ● TEGL 11-11, Change 2 ● EDD TAG 	<ul style="list-style-type: none"> ● Date of Entry Stamp in Passport ● I-94 with Date of Entry Stamp ● Letter from U.S. Citizenship and Immigration Services (USCIS) with Date of Entry with Documentation of Age
<p>Social Security Number (SSN) <i>(WIOA staff should request a SSN from all applicants, but services cannot be denied to anyone refusing to provide their SSN when status can be documented via other means)</i></p>	<ul style="list-style-type: none"> ● TEGL 05-08 	<ul style="list-style-type: none"> ● Cross-match with UI Records ● DD-214, Report of Transfer or Discharge (if SSN is listed) ● Employment Records (if full SSN is listed) ● Federal or State ID (if full SSN is listed) ● IRS Form Letter 1722 ● Military Identification ● Passport ● Pay Stub (if full SSN is listed) ● Social Security Card ● W-2 Form

Eligibility Criteria	References	Acceptable Documentation
WIOA Adult Priority of Service Criteria		
<p>Basic Skills Deficiency <i>(academic or language literacy)</i></p>	<ul style="list-style-type: none"> • WIOA Section 3(5) • 20 CFR 664.205 & 681.290 • TEGL 22-15 • EDD TAG 	<ul style="list-style-type: none"> • National Reporting System (NRS) Approved Standardized Assessment Test Score (such as CASAS or TABE) • School Records, such as transcripts or other school documents • A Referral or Records from a Title II Basic Education Program or English Language Learner Program • Case Notes • Self-Attestation Statement for English Language Learner or Other Basic Skills Deficiency
<p>Low Income</p>	<ul style="list-style-type: none"> • WIOA Section 3(36) • TEGL 22-15 • EDD TAG 	<p><i>Recipient of SNAP / CalFresh:</i></p> <ul style="list-style-type: none"> • SNAP / CalFresh Eligibility Verification • Copy of Authorization to Receive SNAP / CalFresh • Documentation of SNAP / CalFresh Benefit Receipt • Referral Transmittal from SNAP / CalFresh <p><i>Recipient of TANF / CalWORKS:</i></p> <ul style="list-style-type: none"> • TANF / CalWORKS Eligibility Verification • TANF / CalWORKS Period of Benefit Receipt Verification • Referral Transmittal from TANF / CalWORKS <p><i>Recipient of SSI:</i></p> <ul style="list-style-type: none"> • SSI / SSDO Receipt of Benefits Verification • Referral Transmittal from SSA • SSI / SSDI Eligibility Verification <p><i>Recipient of Other State or Local Income-Based Public Assistance:</i></p> <ul style="list-style-type: none"> • Copy of Authorization to Receive Cash Public Assistance • Copy of Public Assistance Check • Medical Card Showing Case Grant Status • Public Assistance Eligibility Verification <p>OR</p> <p><i>Family Income Determination:</i> Refer to low-income section of policy for income sources to include and to not include in family income determination. Family size must be determined before making a family income determination.</p>

Eligibility Criteria	References	Acceptable Documentation
WIOA Dislocated Worker Eligibility Criteria		
Dislocated Spouse of a Military Service Member*	<ul style="list-style-type: none"> • TEGL 19-16, Attachment III • EDD TAG 	<ul style="list-style-type: none"> • Spouse’s Documentation Certifying a Service-Connected Death or Disability • Spouse’s Permanent Change of Station Orders • Self-Attestation or signed Individual Employment Plan may be used to satisfy “unemployed or underemployed and experiencing difficulty obtaining or upgrading employment” <p><i>* Dislocation date must be on the documentation</i></p>
Dislocated but Ineligible for UI Compensation	<ul style="list-style-type: none"> • EDD TAG 	<ul style="list-style-type: none"> • Pay Check Stubs • Self-Attestation Statement • Written Statement by Employer or Union Representative • UI Records - DE 429Z Notice of UI Award or DE 4581 Continued Claim Paper Form • W-2 and/or Tax Returns
Dislocation from Facility Closure*	<ul style="list-style-type: none"> • TEGL 19-16, Attachment III • EDD TAG 	<ul style="list-style-type: none"> • Bankruptcy Documents if under Chapter 7, Title 11 • WARN Notice • Media Announcement Describing Closure or Mass Layoff with Media Source Name and Date on Copy • Rapid Response List or Sign-In Sheet • Self-Attestation Statement • Verbal or Written Verification from Employer, Union Representative, or Employer’s Financial / Legal Representative. Must be documented in a case note that includes employer’s name, title, phone number, and date of dislocation. • Unemployment Insurance (UI) Form 501 Signed by Employer Representative <p><i>* Dislocation date must be on the documentation</i></p>
Displaced Homemaker	<ul style="list-style-type: none"> • WIOA Sec. 3(16) • TEGL 19-16, Attachment III • TEGL 22-15 • EDD TAG 	<ul style="list-style-type: none"> • Bank Records showing financial dependence on spouse, no separate individual income support, or no employment income earned • Court Records • Divorce Papers or Legal Separation • Notarized Statement from Family Member of Ex-Spouse on Non-Support • Public Assistance Records • Self-Attestation Statement • Spouse’s Death Record • Spouse’s Layoff Notice
Layoff or Notice of Layoff	<ul style="list-style-type: none"> • TEGL 19-16, Attachment III • EDD TAG 	<ul style="list-style-type: none"> • Case Notes Verifying Attendance of RESEA or PJSA • DD-214

Eligibility Criteria	References	Acceptable Documentation
		<ul style="list-style-type: none"> • DE 8406 Personalized Job Search Assistant (PJSA) Appointment Notice • DE 8530 Reemployment Services and Eligibility Assessment (RESEA) Appointment Notice • PJSA or RESEA CalJOBS activities entered by staff • Screen Print or Photocopy of Media Article Describing Layoff (printout must show name and date of publication) • Self-Attestation Statement • Verbal or Written Verification from Employer, Union Representative, or Employer’s Financial / Legal Representative. Must be documented in a case note that includes employer’s name, title, phone number, and date of dislocation. • WARN Notice <p><i>* Dislocation date must be on the documentation</i></p>
Self-Employment Dislocation*	<ul style="list-style-type: none"> • TEGL 19-16, Attachment III • EDD TAG 	<ul style="list-style-type: none"> • Bankruptcy Documents Listing Business and Applicant’s Name • Business License • Completed Federal Income Tax Return (Schedule SE) for Most Recent Tax Year • Copy of Articles of Incorporation for the Business Listing Applicant as Principal • Self-Attestation Statement <p><i>* Dislocation date must be on the documentation</i></p>
Unemployment Compensation Eligibility or Exhaustion	<ul style="list-style-type: none"> • EDD TAG 	<ul style="list-style-type: none"> • DE 4292 Notice of UI Award • DE 8406 PJSA Appointment Notice • DE 8530 RESEA Appointment Notice • Notice or Referral to RESEA • Statement by an UI Representative • UI Records - DE 1180PH Claim Status and Payment History form, DE 4581 Continued Claim Form, Copy of UI Online Payment Information, Telephone Verification through EDD Tele-Cert
Unlikely to Return to Previous Industry or Occupation	<ul style="list-style-type: none"> • EDD TAG 	<ul style="list-style-type: none"> • Case Notes Verifying Attendance of RESEA • Current Labor Market Information (LMI) Showing Industry and/or Occupation is in Decline • DD-214 • DE 8530 RESEA Appointment Notice • Employment Specialist’s Determination • Referral to RESEA • Screen print from Internet Site (such as CalJOBS, State LMI Division, or WDB LMI software) that indicates lack of Industry/Occupation Availability

Eligibility Criteria	References	Acceptable Documentation
		<ul style="list-style-type: none"> • Self-Attestation Statement • Doctor or Vocational Rehabilitation Counselor Statement Indicating Applicant’s Inability to Return to Previous Industry/Occupation due to Physical Limitations • Supplemental Job Displacement Benefit (SJDB) Voucher, issued by Division of Worker’s Compensation for state-approved education retraining or skills enhancement
Other Eligibility and Enrollment Data Elements		
Disability	<ul style="list-style-type: none"> • 20 CFR 681.280 • TEGL 21-16 • EDD TAG 	<ul style="list-style-type: none"> • Assessment Test Results • Medical Records or Physician’s (or other Licensed Clinical Professional) Diagnosis / Note • School Records or Letter Stating Disability • Self-Attestation Applicant Statement • Social Security Administration Disability Records • Social Service Records / Referral • Veterans Administration Letter / Records
Employment Status at Time of Participation	<ul style="list-style-type: none"> • TEGL 22-15 	<ul style="list-style-type: none"> • Case Notes Showing Information Collected from Participant • Pay Stub
Justice-Involved <i>(defined by WIOA as offenders)</i>	<ul style="list-style-type: none"> • WIOA Section 3(38) • 20 CFR 688.120 • TEGL 22-15 • EDD TAG 	<ul style="list-style-type: none"> • Documentation from Juvenile or Adult Criminal Justice System (including from Educational Partner within the Juvenile or Adult Criminal Justice System) • Case Noted Phone Call, Written Statement, or Referral Document from Court or Probation Representatives • Referral Transmittal from a Reintegration Agency • Self-Attestation Statement • Signed WIOA Intake, Application, or Registration Form
Unhoused (or Homeless) Individual	<ul style="list-style-type: none"> • TEGL 22-15 • WIOA Section 3(24)(G) • EDD TAG 	<ul style="list-style-type: none"> • Letter from Case Worker of Support Provider • Self-Attestation Statement • Statement or Referral from Shelter or Social Service Agency • Signed WIOA Intake or Registration Form
Migrant and Seasonal Farmworker	<ul style="list-style-type: none"> • Locally determined 	<ul style="list-style-type: none"> • Agricultural Employment Documentation • Letter from California Human Development • Paycheck Stub
Single Parent	<ul style="list-style-type: none"> • Locally determined 	<ul style="list-style-type: none"> • Baptismal Record • Child Support Enforcement or Administration Records • Copy of Child’s Birth Certificate • Self-Attestation Applicant Statement • Temporary Cash Assistance (TCA) Approval Notice

Eligibility Criteria	References	Acceptable Documentation
Substantial Cultural Barriers	<ul style="list-style-type: none"> Locally determined 	<ul style="list-style-type: none"> Self-Attestation Applicant Statement Signed WIOA Intake, Application, or Registration form
Veteran Status	<ul style="list-style-type: none"> TEGL 22-15 	<ul style="list-style-type: none"> Cross-Match with Veterans Data DD-214 Copy 4, "Veteran's Certificate of Release or Discharge from Active Duty" Letter from the Veterans' Administration Certifying Veteran Status
Without a High School Diploma	<ul style="list-style-type: none"> Locally determined 	<ul style="list-style-type: none"> Records from an Educational Institution (diploma, GED, transcripts, withdrawal letter, or school documentation) Self-Attestation Applicant Statement Signed WIOA Intake, Application, or Registration Form

DEFINITION OF KEY TERMS

Attachment to the Workforce – as defined in California Employment Development Department’s *WIOA Title I Eligibility Technical Assistance Guide* (EDD TAG) and locally-defined – an individual who has worked at least three consecutive months during the last 12 months.

Definition is used in order to verify dislocated workers who are not eligible for unemployment compensation, but who have been employed for a duration sufficient to demonstrate an attachment to the workforce. Verification of “attachment to the workforce” is only necessary when an applicant worked for an employer not covered under UI or has not worked a sufficient amount of time to qualify for UI. A separating service member who was discharged or release under condition other than dishonorable has demonstrated attachment to the workforce.

Barriers to Employment – as defined by WIOA Sec 3(24) – populations included in the “individuals with barriers to employment” include:

- Displaced homemakers
- Low-income individuals
- Indians, Alaska Natives, and Native Hawaiians,
- Individuals with disabilities
- Older individuals
- Ex-offenders
- Homeless individuals
- Youth who have aged out of the foster care system
- Individuals who are English language learners, individuals who have low levels of literacy, and individuals facing substantial cultural barriers,
- Eligible migrant and seasonal farmworkers
- Individuals within two years of exhausting lifetime TANF eligibility
- Single parents (including single pregnant women), and
- Long-term unemployed individuals

Basic Skills Deficient – as defined by WIOA Sect. 3(5) and WSD15-14 – with respect to an adult who is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual’s family, or in society. Criteria used to determine whether an individual is basic skills deficient includes the following:

- Enrolled in a Title II Basic Adult Education or English Language Learner program.
- English, reading, writing, or computing skills at an 8.9 or below grade level.
- Determined to be Limited English Skills proficient through staff-documented observations.

The WIOA and DOL regulations do not further define the “level necessary to function on the job, in the individual’s family, or in society.” As such, the WDB locally defines the level necessary to function on the job, in the individual’s family, or in society to include self-attested or assessed survival skills, including but not limited to, computer skills and

financial literacy skills. Employers often perceive that an individual who lacks a high school diploma or high school equivalency is not at the skill level necessary to function on the job; therefore, the WDB includes a lack of a high school diploma or high school equivalency as a deficiency in the level necessary to function on the job or in society.

Case Notes – as defined in EDD TAG – paper or electronic statements by the case manager that identify, at a minimum:

- A participant’s status for a specific data element;
- The date on which the information was obtained; **and**
- The case manager who obtained the information.

If case notes are used as a documentation source, the case notes must provide a documented trail back to the source of information verified.

Cross Match – as defined by TEGL 22-15, Attachment A – a cross-match requires validators to find detailed supporting evidence for the data element in a database. An indicator or presence of a Social Security Number in a non-WIOA database is not sufficient evidence, validators must also find supporting information such as dates of participation and services rendered.

Disability – as defined by the American with Disabilities Act of 1990 Sect. 12192(1-3) – with respect to an individual, the term disability means:

- (A) A physical or mental impairment that substantially limits one or more major life activities of such individual;
- (B) A record of such an impairment; or
- (C) Being regarded as having such an impairment where the individual established that he or she has been subjected to an action prohibited under the Americans with Disabilities Act of 1990 because of an actual or perceived physical or mental impairment whether the impairment limits or is perceived to limit a major life activity. Major life activities include but are not limited to, caring for oneself, performing manual tasks, seeing, hearing, eating, sleeping, walking, standing, lifting, bending, speaking, breathing, learning, reading, concentrating, thinking, communicating, and working. The term disability shall not apply to impairments that are transitory and minor. A transitory impairment is impairment with an actual or expected duration of 6 months or less.

Displaced Homemaker – as defined by WIOA Sect. 3(16) – an individual who has been providing unpaid services to family members in the home and who:

- (A) Either
 - a. has been dependent on the income of another family member but is no longer supported by that income; or
 - b. is the dependent spouse of a member of the Armed Forces on active duty (as defined in section 101(d)(1) of title 10, United States Code) and whose family income is significantly reduced because of a deployment (as defined in section 991(b) of title 10, United States Code, or pursuant to paragraph (4) of such section), a call or order to active duty pursuant to a provision of

law referred to in section 101(a)(13)(B) of title 10, United States Code, a permanent change of station, or the service-connected (as defined in section 101(16) of title 38, United States Code) death or disability of the member; **and**

(B) is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

Eligible Spouse of a Veteran – as defined in 38 U.S.C. 4215(a) and TEGL 10-09 – an eligible spouse of purposes of job counseling, training, and placement services for veterans pursuant to Title 38, Chapter 41 of the United States Code means the spouse of any of the following:

(A) any veteran who died of a service-connected disability,

(B) any member of the Armed Forces serving on active duty who, at the time of application for WIOA assistance is listed for a total of more than ninety days:

i. missing in action,

ii. captured in the line of duty by a hostile force, or

iii. forcible detained or interned in the line of duty by a foreign government or power,

(C) any veteran who has a total disability permanent resulting from a service-connected disability, as evaluated by the Department of Veterans Affairs, or

(D) any veteran who died while a disability so evaluated was in existence.

The spouse whose eligibility is derived from a living veteran or service member (i.e., categories b or c above) would lose his or her eligibility if the veteran or service member were to lose the status that is the basis for the eligibility (e.g. if a veteran with a total service-connected disability were to receive a revised disability rating at a lower level). Similarly, for a spouse whose eligibility is derived from a living veteran or service member, that eligibility would be lost upon divorce from the veteran or service member. The definition of spouse includes same-sex spouses.

Employed – as defined in TEGL 10-16, Change 2, Attachment I – is an individual who did any work at all as a paid, unsubsidized employee on the date participation occurs; OR worked 15 hours or more in an unpaid job on a farm or business operated by a family member.

English Language Learner – as defined by WIOA Sect. 3(21) and WIOA Sect 203(6) – an individual who has limited ability in reading, writing, speaking, or comprehending the English language, and:

(A) Whose native language is a language other than English; or

(B) Who lives in a family or community environment where a language other than English is the dominant language.

Family – as defined in EDD TAG – for the purposes of WIOA eligibility, a family is two or more persons related by blood, marriage (including same-sex marriage) or decree of court, who are living in a single residence.

General Economic Conditions – as defined locally – for the purposes of defining self-employed dislocation due to general economic conditions, general economic conditions is defined as economic hardships such as increasing inflation, high unemployment rates, high mortgage rates, decreased consumer demand, or negative impacts to the economy due to declarations of emergency.

Indians, Native Alaskans, and Hawaiians – as defined in WIOA Sec 166(b) – includes:

- Indian as defined in 25 USC 450b means a person who is a member of an Indian tribe, which means any Indian tribe, band, nation, or other organized group recognized as eligible for the special programs and services provided by the United States to Indians because of their status as Indians
- Alaska Native as defined by 43 USC 1602(b) (r) includes a citizen of the United States who is a person of one-fourth degree or more Alaskan Indian Eskimo or Aleut blood, or combination thereof or any lineal descendant of a Native.
- Native Hawaiian as defined in 20 USC 7517 (2) means any individual who is a citizen of the United States who is a descendant of the aboriginal people who, prior to 1778, occupied and exercised sovereignty in the area that now comprises the state of Hawaii as shown by genealogical records, Kupuna or Kamaaina verification, or certified birth records.

Individual with a Disability as defined in the Americans with Disabilities Act Sect. 12012 (1) and in WIOA Sect. 3(25) is an individual with

- (A) a physical or mental impairment that substantially limits one or more major life activities of such individual;
- (B) a record of such an impairment; or
- (C) being regarded as having such an impairment (as described in the Americans with Disabilities Act § 12102 (3))

Justice-Involved Individual (defined in WIOA as Offender) – As defined by WIOA Section 3(39) – an adult or juvenile

- (A) who is or has been subject to any stage of the criminal justice process, and for whom services under this Act may be beneficial; or
- (B) who requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction for committing delinquent acts, such as crimes against persons, crimes against property, statue offences, or other crimes.

Long-term Unemployed - as defined in the Federal Register 2015-007 PIRL – an individual who has been unemployed for 27 or more consecutive weeks.

Low-income Individual as defined by WIOA Sec. 3(36) means an individual who:

- receives, or in the past 6 months has received, or is a member of a family that is receiving or in the past 6 months has received

- assistance through the Supplemental Nutrition Assistance Program (SNAP) established under the Food and Nutrition Act of 2008 (7 U.S.C. 2011 et seq.),
- the program of block grants to States for Temporary Assistance for Needy Families program (TANF) under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.),
- the Supplemental Security Income program (SSI) established under title XVI of the Social Security Act (42 U.S.C. 1381 et seq.), or
- State or local income-based public assistance;
- is in a family with total family income that does not exceed the higher of
 - the poverty line; or
 - 70% of the lower living standard income level (LLSIL);
- is an unhoused (also called homeless) individual; or
- is an individual with a disability whose own income meets the income requirement of clause, but who is a member of a family whose income does not meet this requirement.

Low Levels of Literacy – as defined in the Federal Register 2015-007 PIRL – when a participant is unable to read, write, and speak in English; compute and solve problems at levels of proficiency necessary to function on the job, in the family of the participant, or in society.

Lower Living Standard Income Level (LLSIL) – the income level (adjusted for regional, metropolitan, urban, and rural differences and family size), determined annually by the U.S. Department of Labor based upon the most recent lower living family budget, published annually in the Federal Register.

Non-Custodial Parent – as defined by 45 CFR 260.30 – a parent of a minor child how:

- lives in the state; and
- does not live in the same household as the minor child.

Older Individual – as defined in WIOA Sect. 3(39) – an individual age 55 or older.

Public Assistance Recipient – as defined in WIOA Sect. 3(50) – an individual that receives federal, state, or local government cash payments for which eligibility is determined by a needs or income test.

Recently Separated Veteran – as defined in WIOA Sect. 3(63) – any veteran who applies for participation in WIOA within 48 months after discharge or release from active military, naval, or air service.

Self-Attestation – as defined in EDD TAG – also referred to as a participant statement or self-certification – occurs when an individual states his or her status for a particular data element and then signs and dates a form acknowledging this status. Self-attestation must include a statement that the information submitted to demonstrate eligibility for a program under Title I of WIOA is true and accurate.

Self-Sufficiency – as defined locally and in EDD TAG – for WIOA eligibility purposes, self-sufficiency means employment that pays at the levels defined in the [Living Wage Calculator](#) for Solano County, CA.

Single Parent – as defined in EDD TAG – includes single parents, single pregnant individuals, or non-custodial parents.

State MIS – as defined in TEGL 22-15, Attachment A – refers to specific, detailed information that is stored in the state’s information system that supports an element. An indicator, such as a checkmark on a computer screen, is not acceptable source documentation in and of itself. For example, State MIS is an acceptable source of documentation for date of training service, but should have information about the type of training and the organization providing that training.

Substantial Cultural Barriers – as defined by the Federal Register 2015-007 Participant Individual Record Layout (PIRL) – barriers that exist when a participant perceives him or herself as possessing attitudes, beliefs, customs or practices that influence a way of thinking, acting or working that may serve as a hindrance to employment.

Underemployed – as defined in 20 C.F.R. Sect. 668.150 and TEGL 03-15 – an individual who is:

- employed less than full-time who desires full time employment,
- working in employment not commensurate with the individual’s demonstrated level of educational and/or skill achievement,
- employed who meets the definition of a low-income individual under WIOA, **or**
- employed but whose current job’s earnings are less than 80% of their previous job earnings.

Unemployed – as defined in WIOA Sect. 3(61) – an individual who is without a job and who wants and is available for work. The determination of whether an individual is without a job, shall be made in accordance with the criteria used by the Bureau of Labor Statistics of the Department of Labor in defining individuals as unemployed.

Unhoused (defined in WIOA as Homeless) **Individual** – as defined in sec. 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e–2(6)),

(A) means an individual who lacks a fixed, regular, and adequate nighttime residence; and

(B) Includes –

a. an individual who—

- i. is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason;
- ii. is living in a motel, hotel, trailer park, or campground due to the lack of alternative adequate accommodations;
- iii. is living in an emergency or transitional shelter;

- iv. is abandoned in a hospital; or
- v. is awaiting foster care placement;
- b. an individual who has a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; or
- c. migratory children (as defined in section 1309 of the Elementary and Secondary Education Act of 1965; 20 U.S.C. 6399) who qualify as homeless under this section because the children are living in circumstances described in this paragraph;

“Unlikely to return to previous industry or occupation” – as defined locally – a dislocated worker who was laid off from a position and meets at least one (1) of the requirements below, as documented by self-attestation:

- Number of opportunities in previous industry/occupation is declining based on labor market information;
- Supply of candidates in previous industry/occupation exceeds the number of opportunities in the county;
- Projected annual employment increase for industry or occupation is less than 100 jobs;
- The individual has engaged in an unsuccessful job search in their previous industry/occupation for over 3 months;
- Individual can no longer meet the minimum requirements for positions available in their occupation;
- Lacks skills or certification needed to compete in the open job market for that same occupation or industry
- Change in family, personal, or financial circumstances that affect the individual’s likelihood of returning to previous occupation or industry;
- Job loss due to mechanization or automation of job duties;
- Wage variable for positions no longer matches with individual’s level of skills and experience; and/or
- Individual is unable to perform the duties of the previous industry/occupation due to age, ability, illness/injury, disability, or other barriers.

Veteran – as defined in WIOA Sect. 3(63), 38 U.S.C. Sect. 101, and TEGL 10-09 – an individual who served as least one day in the active military, naval, or air service, and who was discharged or released therefrom under conditions other than dishonorable. Active service includes full-time federal service in the National Guard or a Reserve component. This definition of “active service” does not include full-time duty performed strictly for training purposes (i.e., that which is often referred to as “weekend” or “annual” training), nor does it include full-time active duty performed by National Guard personnel who are mobilized by state rather than by federal authorities.



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

POLICY ACKNOWLEDGEMENT OF RECEIPT AND UNDERSTANDING FOR:

WIOA Adult and Dislocated Worker Enrollment and Eligibility Policy

The *WIOA Adult and Dislocated Worker Enrollment and Eligibility Policy* explains the responsibilities of any individual funded by the Workforce Development Board (WDB) of Solano County’s Workforce Innovation and Opportunity Act (WIOA) programs.

By signing below, I confirm that I have received the *WIOA Adult and Dislocated Worker Enrollment and Eligibility Policy*. I understand that if I am funded by WIOA Adult or Dislocated Worker funds, it is my responsibility to read and comply with the information contained in this policy and any revisions made to it.

Since the information and policies described in the policy are necessarily subject to change, I acknowledge that revisions to the policy may occur. All such changes will be communicated through official notices. I understand that revised information may supersede, modify, or eliminate existing policies.

I understand that federal, state, and local auditors / monitors may verify that WIOA-funded staff understand and implement enrollment and eligibility requirements per this policy.

I understand that I should consult with my supervisor or WDB program contact if I have any questions about the information contained in the policy. I understand that failure to comply with the information contained in the policy could lead to disciplinary action or termination of employment or contract.

Individual’s Name (printed): _____

Organization: _____

Individual’s Signature: _____ **Date:** _____



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

AGENDA

SUBJECT: Review and Approval of Budget Mod #1 for Fiscal Year (FY) 2024-25 as Recommended by the Budget Committee	MEETING DATE September 20, 2024	AGENDA ITEM X.C
FROM: Heather Henry, President/Executive Director	ACTION REQUIRED YES ✓ NO	ATTACHMENTS A, B, C

RECOMMENDATION:

Staff and the Budget Committee are recommending approval of the modification to the FY 2024-25 budget presented. The Budget Committee reviewed and approved the modified budget at their September 12, 2024 meeting.

SUMMARY:

Allocations for Workforce Innovation & Opportunity Act (WIOA) Title I formula funds have been finalized from the State of California-EDD for FY2024-25 and are included in the proposed modification. This proposed modification also includes final carryover funds from FY2023-24. This proposed budget modification of **\$9,981,707** represents an overall increase of \$849,698, or 9%, from the projected budget. This increase is primarily due to carryover amounts and increased allocations. It is important to note that much of the carryover funds are slated for participant costs. Although the budget modification increases the total budget, the budgeted funds remains 2% less than last year’s budgeted revenue.

DISCUSSION:

Opportunities and Challenges for the Agency Budget:

Significant funding is included in the FY2024-25 budget for COVID workforce and small business recovery through American Rescue Plan Act (ARPA) funding. This will be the last year of ARPA funding. The fiscal team will be working through sustainability measures and alternative funding streams in order to maintain current service delivery as much as possible.

The WDB will be close to hitting the 30% training expenditure for FY2024-25 WIOA Adult and Dislocated Worker requirements; however, to do so will require a programmatic push to ensure the dollars budgeted are spent. The budget continues to experience strain in WIOA funding streams. Of the WIOA formula funds (Adult, Dislocated Worker, and Youth), 60% of expenditures are attributed to personnel with no change from the preliminary budget. If new federal legislation passes, 50% of Adult and Dislocated Worker funds will be required to be spent on training for participants, which will have a significant impact on the budget.

Revenue and Expenditure Detail:

- **Attachment A:** FY2024-25 Proposed Budget Modification #1
- **Attachment B:** FY2024-25 Proposed Budget Modification #1 by Project
- **Attachment C:** Multi-Year Revenue Detail

Revenue – FY2024-25

Unknowns

- Grant applications or funding opportunities are in the pipeline that may positively impact revenue in FY2024-25:
 - The WDB has been invited to continue to be on the ReWork the Bay Committee. A \$50,000 annual operating grant accompanies this opportunity.
 - The WDB applied for a California Community Reinvestment Grant (CalCRG) in September for a total request of \$875,528 over a three-year period.
 - The WDB will be applying for additional grants throughout the year.
- The WDB is working on becoming a Pearson-Vue testing site, which once up and running, will become a source of revenue.
- The Solano-Napa SBDC grant year is January – December. Funding levels for 2025 are currently unknown and are anticipated based on the requested budget for 2025.

Changes from FY2023-24 Preliminary Budget to Proposed Mod #1:

This discussion focuses on changes that are +/-10% or more and over \$10,000

New Revenue Sources included in FY2022-23 Mod #1:

- City of San Francisco, California Jobs First Fiscal Agent – The WDB will receive \$100,000 to provide fiscal agent support for the Bay Area CA Jobs First Initiative.
- South Bay Workforce Investment Board (WIB), Apprenticeships – Through a Department of Labor Grant, South Bay WIB received funds to help other CA workforce boards promote and implement apprenticeships. The Business Services Team will be able to charge \$25,000 here for engaging with businesses regarding apprenticeships.
- Jobs for the Future – The WDB received \$10,000 from Jobs for the Future as seed funding to conduct bioeconomy activities. These funds will be used to host a Vallejo community event to build awareness of the industry.

Changes in Revenue:

- WIOA Adult funding was increased by \$168,785, or 14%, primarily due to increased carry-over of participant training funds.
- WIOA Dislocated Worker funding was increased by \$244,105, or 23%, due to an increase in allocations compared to the preliminary estimate.
- WIOA Youth funding was increased by \$261,699, or 19%, predominantly due to increased carry-over of funds. A significant amount of these funds carried-over must be spent on Work Experience.
- WIOA Rapid Response funding was increased by \$12,675, or 11%, due to an increase in allocations compared to the preliminary estimate.

- WIOA Layoff Aversion funding was increased by \$16,781, or 82%, due to an increase in allocations compared to the preliminary estimate.
- CWDB – Regional Implementation 5.0 funding was decreased by \$15,179, or 45%, as the grant concludes in FY24-25. The budget amount represents the remaining grant funding.
- County of Solano – ARPA 1: Sustain Service Delivery funding was decreased by \$83,375, or 44%, as the grant concludes in FY24-25. The budget amount represents the remaining grant funding.
- County of Solano – ARPA 3: Industry Training funding was increased by \$87,172, or 11%, due to a higher than anticipated carry over amount. The budget amount represents the remaining grant funding.
- County of Solano – ARPA SB1 (Small Business TA) funding was increased by \$50,796, or 40%, due to a shift of \$100,000 from SB3 to SB1. The budget amount represents the remaining grant funding.
- County of Solano – ARPA SB3: Services for Businesses funding was decreased by \$149,195, or 64%, due to a shift of \$100,000 from SB3 to SB1. The budget amount represents the remaining grant funding.
- NorCal SBDC – Technical Assistant Program funding is increased by \$29,670, or 35%, due to the timing of funds spent and anticipating higher rates of expenditures prior to Jun 2025.
- SBDC Program Income was reduced by \$30,165 due to a reconciliation of revenue through June 2022 due to higher than anticipated expenditures in FY2022-23, reducing the carry over amount into FY2023-24.
- Irvine Capacity Building Grant funding was increased by \$34,744, or 15%, due to higher than anticipated carry over from FY2023-24.
- SBDC Program Income funding was increased by \$10,406, or 116%, due to new fee-for-service options provided by Solano-Napa SBDC.

Expenditures - 2020-21:

Unknowns:

- Negotiations with SEIU 1021 are currently underway with salary increases not yet finalized.

Changes from FY2023-24 Projected Budget to Proposed Mod #1:

This discussion focuses on changes that are +/-10% or more and over \$10,000

Changes in Expenditures:

- Salaries and Benefits expenditures were increased by \$272,411 due to allowability in the budget to maintain current staffing costs, as well as anticipated higher increases in healthcare costs.
- Vocational Training expenditures were increased by \$159,614, or 20%, due to carry-over of training funds.
- Work-Based Learning expenditures were reduced by \$15,000, or 11%, due to reduced demand for work-based learning based on prior year expenditures.
- Business Advisors expenditures were increased by \$69,359 to reflect additional funds received under ARPA SB1.

- Small Business Grants / Payments expenditures were decreased by \$756,865, or 78%. Part of the reduction was due to completion of small business payments prior to June 30, 2024, reducing the carry-over. A significant amount of funds were reclassified as program contracts to better match accounting coding.
- Outreach expenditures were reduced by \$136,395, or 51%, primarily due to reclassifying expenditures as program contracts to better match accounting coding.
- Program Contracts expenditures were increased by \$1,110,691, or 44%. Part of the increase was due to a higher than anticipated carry-over from FY2023-24. However, the increase is primarily due to reclassification of expenditures from small business grants/payments and outreach to better match accounting coding.
- Communications / IT expenditures were increased by \$18,851, or 21% to better reflect expenditure classification after review from prior year. Some of the costs included are one-time costs to complete Vallejo AJCC upgrades.
- Employee/WDB Professional Development expenditures were decreased by \$14,254, or 16% due to lower than anticipated carry-over funds from RPI 5.0.
- Facilities expenditures were increased by \$60,123 or 12%, due to final lease negotiations with California Employment Development Department for the Vallejo AJCC.
- Supplies / Equipment / Software represents adjustments from reclassification of costs and creating a new line item for Software. The expenditures in these two line items for FY2024-25 will inform future budgeting allocations for these costs.
- Other Operating Costs expenditures increased by \$33,375 to better match analysis of prior year spending amounts. This includes a one-time cost to upgrade modules in the WDB's accounting software.

Budget Modifications:

It is typical for the agency budget to be modified at times throughout a program year:

- A first modification is generally submitted, which includes final grant allotments, finalization of funds carried over from the prior year, recalculated line-item expenditure amounts to replace estimates, and changes in service delivery strategies.
- Any subsequent modifications will be the result of changes in available grant funding, program design, and/or cost of goods and services.

The WDB's budget responsibility to the County has been satisfied by the submission of a budget for program year 2024-25. The County budget cycle is timed differently than the WDB cycle and allows for changes to be made to the County budget for new grant awards to align it with the WDB-approved program operation budgets.

ALTERNATIVES:

Alternatively, the Board could choose not to approve the recommended modification and request additional information before approval.

REPORT PREPARED BY:

Heather Henry, President / Executive Director. Please contact Heather at 707-863-3501 should you have any questions regarding the information outlined in this report.

WDB SOLANO

FY2024-25 Budget Mod #1

Presented to the Board of Directors 9.20.24

	BUDGET FY2024-25 <i>Preliminary</i>	FY2023-24 Year End Expenditures	FY23-24 % Spent vs Planned	BUDGET FY2024-25 <i>Mod #1</i>	\$ Increase / Decrease	% Increase / Decrease
REVENUE:						
<i>State Grant Revenue</i>						
WIOA Adult	\$1,175,142	\$1,099,456	97%	\$1,343,924	\$168,782	14%
WIOA Dislocated Worker	\$1,043,346	\$953,006	81%	\$1,287,452	\$244,105	23%
WIOA Youth	\$1,397,608	\$900,873	74%	\$1,659,307	\$261,699	19%
WIOA Rapid Response	\$113,783	\$151,006	85%	\$126,458	\$12,675	11%
WIOA Layoff Aversion	\$20,408	\$29,625	100%	\$37,189	\$16,781	82%
CWDB - Regional Plan Implementation 5.0	\$33,739	\$87,651	83%	\$18,560	(\$15,179)	-45%
Grant Revenue Total	\$3,784,025	\$3,221,618		\$4,472,890	\$688,865	18%
<i>Other Government Grants/Contracts</i>						
City of Napa - ARPA Leaf Blower Grant	\$47,739	\$33,408	39%	\$48,747	\$1,008	2%
City of San Francisco - CA Jobs First Fiscal Agent	\$0	\$0	0%	\$64,000	\$64,000	100%
County of Solano - ARPA 1: Sustain Service Delivery	\$187,645	\$124,285	46%	\$104,270	(\$83,375)	-44%
County of Solano - ARPA 2: Community Workforce	\$903,460	\$905,784	65%	\$875,578	(\$27,882)	-3%
County of Solano - ARPA 3: Industry Training	\$830,166	\$683,349	52%	\$917,338	\$87,172	11%
County of Solano - ARPA 4: Community Engagement	\$460,669	\$377,854	51%	\$470,003	\$9,334	2%
County of Solano - ARPA SB1: Small Business TA	\$127,076	\$325,695	98%	\$177,872	\$50,796	40%
County of Solano - ARPA SB2: Business Incubator	\$70,000	\$203,989	73%	\$76,721	\$6,721	10%
County of Solano - ARPA SB3: Services for Businesses	\$233,636	\$96,898	29%	\$84,441	(\$149,195)	-64%
CWDB - HIRE Reentry Grant	\$947,736	\$200,720	0%	\$985,887	\$38,151	4%
CWDB - Prison to Employment 2.0	\$220,413	\$61,609	34%	\$219,059	(\$1,354)	-1%
CWDB - Regional Equity	\$598,958	\$153,784	34%	\$646,889	\$47,931	8%
NorCal SBDC - Capital Improvement Program	\$95,000	\$126,536	123%	\$95,000	\$0	0%
NorCal SBDC - Inclusivity Project	\$20,000	\$19,995	0%	\$20,005	\$5	0%
NorCal SBDC - Small Business Administration	\$188,355	\$149,591	84%	\$188,494	\$139	0%
NorCal SBDC - Technical Assistance Program	\$85,402	\$139,028	87%	\$115,072	\$29,670	35%
SBDC Local Match	\$64,800	\$50,768	92%	\$69,800	\$5,000	8%
South Bay WIB - Apprenticeships	\$0	\$0	0%	\$25,000	\$25,000	100%
Other Government Revenue Total	\$5,081,055	\$3,653,292		\$5,184,175	\$103,120	2%
<i>Other Revenue</i>						
Irvine Capacity Building	\$228,525	\$51,106	0%	\$263,269	\$34,744	15%
Jobs for the Future	\$0	\$0	0%	\$10,000	\$10,000	100%
Mare Island Company	\$26,086	\$10,447	0%	\$29,553	\$3,467	13%
Napa Valley College	\$3,318	\$904	27%	\$2,414	(\$904)	-27%
SBDC Program Income	\$9,000	\$17,305	326%	\$19,406	\$10,406	116%
Other Revenue Total	\$266,929	\$79,762		\$324,642	\$57,713	22%
TOTAL REVENUE	\$9,132,008	\$6,954,672		\$9,981,707	\$849,698	9%

	BUDGET FY2024-25 <i>Preliminary</i>	FY2023-24 Year End Expenditures	FY23-24 % Spent vs Planned	BUDGET FY2024-25 <i>Mod #1</i>	\$ Increase / Decrease	% Increase / Decrease
EXPENSES:						
Salaries and Benefits	\$3,196,407	\$2,834,571	83%	\$3,468,818	\$272,411	9%
Personnel Expenses	\$3,196,407	\$2,834,571		\$3,468,818	\$272,411	9%
Vocational Training	\$807,709	\$547,371	56%	\$967,323	\$159,614	20%
Work-Based Training	\$134,500	\$108,193	86%	\$119,500	(\$15,000)	-11%
Supportive Services	\$55,000	\$75,417	240%	\$58,369	\$3,369	6%
Business Advisors	\$243,987	\$378,765	108%	\$313,346	\$69,359	28%
Small Business Grants / Payments	\$972,327	\$819,438	43%	\$215,462	(\$756,865)	-78%
Outreach	\$266,433	\$23,286	6%	\$130,039	(\$136,395)	-51%
Program Contracts	\$2,524,546	\$1,851,633	89%	\$3,635,237	\$1,110,691	44%
Direct Program Costs	\$5,004,501	\$3,804,103		\$5,439,276	\$434,775	9%
Communications / IT	\$91,572	\$129,495	141%	\$110,423	\$18,851	21%
Employee / WDB Professional Development	\$90,280	\$49,243	147%	\$76,026	(\$14,254)	-16%
Facilities	\$518,858	\$449,098	91%	\$578,981	\$60,123	12%
Memberships	\$15,100	\$12,705	90%	\$17,438	\$2,338	15%
Mileage / Travel	\$25,815	\$10,734	72%	\$30,749	\$4,934	19%
Supplies / Equipment	\$4,600	\$49,730	38%	\$64,768	\$60,168	1308%
Software	\$77,463	\$0	0%	\$54,441	(\$23,022)	-30%
Other Operating Costs	\$107,412	\$162,294	98%	\$140,787	\$33,375	31%
Other Costs	\$931,100	\$863,299		\$1,073,613	\$142,513	13%
TOTAL EXPENSES	\$9,132,008	\$7,501,973		\$9,981,707	\$849,699	9%

Revenue Over / (Under) Expenses

\$0

\$0

WDB SOLANO
FY2024+25 Budget Mod #1 Detail

	TOTAL BUDGET	WIOA				WIOA Layoff Aversion	CWDB RPI 5.0	City of San Francisco - CA Jobs First			SOLANO ARPA - Community Workforce	SOLANO ARPA - Industry Training
		WIOA Adult	WIOA Dislocated Worker	WIOA Youth	WIOA Rapid Response			SOLANO ARPA - Sustain Svcs	Napa - Leaf Blower	City of San Francisco - CA Jobs First	SOLANO ARPA - Community Workforce	SOLANO ARPA - Industry Training
REVENUE STREAMS:												
EDD Grants	\$5,338,838						\$18,560					
Other Government Grants	\$4,318,227											
Other Revenue	\$324,642											
Donations and Contributions												
TOTAL REVENUE	\$9,981,707	\$1,343,924	\$1,287,452	\$1,659,307	\$126,458	\$37,189	\$18,560	\$64,000	\$104,270	\$875,578	\$917,338	
EXPENSES:												
Salaries and Benefits	\$3,468,818	\$857,980	\$827,226	\$839,249	\$98,051	\$37,189	\$1,106	\$2,000	\$20,106	\$17,527	\$71,526	
Personnel Expenses	\$3,468,818	\$857,980	\$827,226	\$839,249	\$98,051	\$37,189	\$1,106	\$2,000	\$20,106	\$17,527	\$71,526	
Vocational Training	\$967,323	\$212,549	\$204,890	\$130,703				\$43,462	\$89,177		\$230,004	
Work-Based Training	\$119,500	\$15,000	\$10,000	\$40,000				\$2,532	\$15,000			
Supportive Services	\$58,369	\$13,276	\$9,000	\$6,000					\$93			
Business Advisors	\$313,346											
Small Business Grants / Payments	\$215,462											
Outreach	\$130,039	\$2,000	\$2,000	\$5,000						\$100,000		
Program Contracts	\$3,635,237	\$11,667	\$11,667	\$389,209			\$17,078	\$40,000	\$756,108		\$459,844	
Direct Program Costs	\$5,439,276	\$254,492	\$237,557	\$570,912	\$0	\$0	\$17,078	\$40,000	\$104,270	\$856,108	\$805,979	
Communications / IT	\$110,423	\$31,779	\$31,328	\$34,493	\$1,402						\$5,526	
Employee / WDB Professional Dev	\$76,026	\$3,000	\$2,000	\$4,500			\$376					
Facilities	\$578,981	\$167,844	\$159,341	\$181,157	\$20,505					\$1,384	\$8,688	
Memberships	\$17,438	\$2,000	\$2,000	\$2,000	\$6,500							
Mileage / Travel	\$30,749	\$4,000	\$4,000	\$4,000								
Supplies / Equipment	\$64,768	\$2,000	\$2,000	\$2,000								
Software	\$54,441	\$5,000	\$5,000	\$5,000								
Other Operating Costs	\$140,787	\$15,829	\$17,000	\$15,996		\$0		\$753	\$3,894	\$559	\$23,879	
Other Costs	\$1,073,613	\$231,452	\$222,669	\$249,146	\$28,407	\$0	\$376	\$753	\$3,894	\$1,943	\$39,833	
TOTAL EXPENSES	\$9,981,707	\$1,343,924	\$1,287,452	\$1,659,307	\$126,458	\$37,189	\$18,560	\$64,000	\$104,270	\$875,578	\$917,338	
Revenue Over / (Under) Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

WDB SOLANO
 FY2024+25 Budget Mod #1 Detail

	TOTAL BUDGET	SOLANO ARPA - Community Engagement	SOLANO ARPA SBI - Small Biz TA	SOLANO ARPA SB2 - Biz Incubator	SOLANO ARPA SB3 - Svcs for Biz	CWDB - HIRE	CWDB - Prison to Employ 2.0	CWDB RERP	SBDC CIP	SBDC Inclusivity	SBDC SBA	SBDC TAP
REVENUE STREAMS:												
EDD Grants	\$5,338,838						\$219,059	\$646,889				
Other Government Grants	\$4,318,227	\$470,003	\$177,872	\$76,721	\$84,441	\$985,887		\$95,000	\$20,005	\$188,494		\$115,072
Other Revenue	\$324,642											
Donations and Contributions												
TOTAL REVENUE	\$9,981,707	\$470,003	\$177,872	\$76,721	\$84,441	\$985,887	\$219,059	\$646,889	\$95,000	\$20,005	\$188,494	\$115,072
EXPENSES:												
Salaries and Benefits	\$3,468,818	\$199,138	\$13,357	\$1,361	\$1,218	\$57,946	\$15,493	\$36,671	\$0	\$0	\$159,264	\$59,677
Personnel Expenses	\$3,468,818	\$199,138	\$13,357	\$1,361	\$1,218	\$57,946	\$15,493	\$36,671	\$0	\$0	\$159,264	\$59,677
Vocational Training	\$967,323							\$100,000				
Work-Based Training	\$119,500					\$39,500						
Supportive Services	\$58,369					\$30,000						
Business Advisors	\$313,346		\$134,489						\$95,000	\$20,005	\$1,955	\$54,582
Small Business Grants / Payments	\$215,462			\$72,000								
Outreach	\$130,039				\$1,376							
Program Contracts	\$3,635,237	\$166,834	\$26,100		\$80,657	\$856,200	\$195,046	\$484,828				
Direct Program Costs	\$5,439,276	\$166,834	\$160,589	\$72,000	\$82,032	\$925,700	\$195,046	\$584,828	\$95,000	\$20,005	\$1,955	\$54,582
Communications / IT	\$110,423	\$2,000					\$312				\$2,583	
Employee / WDB Professional Dev	\$76,026											
Facilities	\$578,981	\$4,500	\$2,325				\$2,445	\$12,584			\$6,319	\$813
Memberships	\$17,438										\$6,749	
Mileage / Travel	\$30,749										\$510	
Supplies / Equipment	\$64,768	\$56,518					\$176					
Software	\$54,441	\$39,265										
Other Operating Costs	\$140,787	\$1,748	\$1,601	\$3,360	\$1,191	\$2,241	\$5,587	\$12,806		\$0	\$8,989	
Other Costs	\$1,073,613	\$104,031	\$3,926	\$3,360	\$1,191	\$2,241	\$8,520	\$25,390	\$0	\$0	\$27,275	\$813
TOTAL EXPENSES	\$9,981,707	\$470,003	\$177,872	\$76,721	\$84,441	\$985,887	\$219,059	\$646,889	\$95,000	\$20,005	\$188,494	\$115,072
Revenue Over / (Under) Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

WDB SOLANO
 FY2024+25 Budget Mod #1 Detail

	TOTAL BUDGET	SBDC Local Match	South Bay Apprenticeship	Irvine Capacity	Jobs for the Future	Mare Island Napa Valley	SBDC Program Income
REVENUE STREAMS:							
EDD Grants	\$5,338,838						
Other Government Grants	\$4,318,227	\$69,800	\$25,000				
Other Revenue	\$324,642			\$263,269	\$10,000	\$29,553	\$19,406
Donations and Contributions							
TOTAL REVENUE	\$9,981,707	\$69,800	\$25,000	\$263,269	\$10,000	\$29,553	\$19,406
EXPENSES:							
Salaries and Benefits	\$3,468,818	\$44,884	\$22,500	\$46,391	\$0	\$19,553	\$19,406
Personnel Expenses	\$3,468,818	\$44,884	\$22,500	\$46,391	\$0	\$19,553	\$19,406
Vocational Training	\$967,323						
Work-Based Training	\$119,500						
Supportive Services	\$58,369						
Business Advisors	\$313,346	\$4,901					\$2,414
Small Business Grants / Payments	\$215,462						
Outreach	\$130,039	\$1,000					
Program Contracts	\$3,635,237			\$120,000	\$10,000	\$10,000	
Direct Program Costs	\$5,439,276	\$5,901	\$0	\$120,000	\$10,000	\$10,000	\$0
Communications / IT	\$110,423	\$1,000					
Employee / WDB Professional Dev	\$76,026			\$66,150			
Facilities	\$578,981	\$6,889		\$5,000			
Memberships	\$17,438	\$2,000					
Mileage / Travel	\$30,749						
Supplies / Equipment	\$64,768						
Software	\$54,441						
Other Operating Costs	\$140,787	\$9,126	\$2,500	\$13,728			\$0
Other Costs	\$1,073,613	\$19,015	\$2,500	\$96,878	\$0	\$0	\$0
TOTAL EXPENSES	\$9,981,707	\$69,800	\$25,000	\$263,269	\$0	\$29,553	\$19,406
Revenue Over / (Under) Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0

WDB SOLANO
FY2024-25 Multi-Year Grant Projections

	Grant Terms	TOTAL AWARD	Expended FY22-23	FY23-24 Expenditures	Carryover FY24-25	Ant Carryover FY25-26
MULTI-YEAR REVENUE						
<i>WIOA Grant Revenue</i>						
<i>WIOA Adult</i>						
AA411039 Round 2	10.1.23 - 6.30.25	\$938,041		\$700,842	\$237,199	
AA511039 Round 1	7.1.24 - 6.30.26	\$242,947			\$242,947	\$ -
AA511039 Round 2	10.1.24 - 6.30.26	\$992,850			\$863,778	\$129,072
<i>Subtotal</i>		\$2,173,838	\$0	\$700,842	\$1,343,924	\$129,072
<i>WIOA Dislocated Worker</i>						
AA411039 Round 2	10.1.23 - 6.30.25	\$775,810		\$436,892	\$338,918	
AA511039 Round 1	7.1.24 - 6.30.26	\$227,596			\$227,596	\$ -
AA511039 Round 2	10.1.24 - 6.30.26	\$828,204			\$720,938	\$107,266
<i>Subtotal</i>		\$1,055,800	\$0	\$436,892	\$1,287,452	\$107,266
<i>WIOA Youth</i>						
AA411039	4.1.23 - 6.30.25	\$1,124,506	\$25,003	\$376,263	\$ 723,240	
AA511039	4.1.24 - 6.30.26	\$1,184,917		\$11,867	\$936,067	\$ 236,983
<i>Subtotal</i>		\$1,184,917	\$25,003	\$388,130	\$1,659,307	\$236,983
<i>WIOA Rapid Response</i>						
AA511039 Round 1	7.1.24 - 6.30.25	\$27,260			\$27,260	
AA511039 Round 2	10.1.24 - 6.30.25	\$99,198			\$99,198	
<i>Subtotal</i>		\$126,458	\$0	\$0	\$126,458	\$0
<i>WIOA Layoff Aversion</i>						
AA511039 Round 1	7.1.24 - 6.30.25	\$8,017			\$8,017	
AA511039 Round 2	10.1.24 - 6.30.25	\$29,172			\$29,172	
<i>Subtotal</i>		\$37,189	\$0	\$0	\$37,189	\$0
CWDB - Regional Plan Implementation 5.0	1.1.23 - 3.31.25	\$131,250	\$25,039	\$87,651	\$18,560	
Grant Revenue Total		\$4,709,452	\$50,042	\$1,613,515	\$4,472,890	\$473,322
<i>Other Government Grants/Contracts</i>						
City of San Francisco - CA Jobs First	7.1.24 - 12.31.26	\$100,000			\$64,000	\$36,000
County of Solano - ARPA #1b: Training	5.1.22 - 6.30.25	\$300,000	\$71,445	\$124,285	\$104,270	
County of Solano - ARPA #2: Community Workf	9.1.22 - 6.30.25	\$2,100,000	\$318,638	\$905,784	\$875,578	
County of Solano - ARPA #3: Industry Training	9.1.22 - 6.30.25	\$1,898,000	\$297,314	\$683,349	\$917,338	
County of Solano - ARPA #4: Community Engage	10.1.22 - 6.30.25	\$1,000,000	\$152,143	\$377,854	\$470,003	
County of Solano - ARPA Small Biz #1: Biz Advj	10.1.22 - 6.30.25	\$602,000	\$98,433	\$325,695	\$177,872	
County of Solano - ARPA Small Biz #2: Biz Incul	10.1.22 - 9.30.24	\$607,000	\$326,290	\$203,989	\$76,721	
County of Solano - ARPA Small Biz #3: Biz Serv	10.1.22 - 9.30.24	\$208,000	\$26,661	\$96,898	\$84,441	
CWDB - HIRE	4.1.24 - 12.31.25	\$1,443,574		\$200,720	\$985,887	\$256,967
CWDB - Prison to Employment 2.0	1.1.23 - 9.30.25	\$434,306	\$0	\$61,609	\$219,059	\$153,638
CWDB - Regional Equity	12.1.22 - 9.30.25	\$1,150,000	\$16,448	\$153,784	\$646,889	\$332,879
<i>NorCal SBDC - Capital Improvement Program</i>						
CIP FY 23-24	10.1.23 - 9.30.24	\$95,000		\$ 95,000	\$0	
CIP FY 24-25	10.1.24 - 9.30.25	\$95,000			\$95,000	\$ -
<i>Subtotal</i>		\$190,000	\$0	\$95,000	\$95,000	\$0
<i>NorCal SBDC - SBA</i>						
SBA 2024	1.1.24 - 12.31.24	\$180,000		\$81,506	\$98,494	
SBA 2025	1.1.25 - 12.31.25	\$180,000			\$90,000	\$90,000
<i>Subtotal</i>		\$360,000	\$0	\$81,506	\$188,494	\$90,000
<i>NorCal SBDC - TA Expansion Program</i>						
TAP FY 23-24	10.1.23 - 9.30.24	\$117,000		\$97,679	\$19,321	
TAP FY 24-25	10.1.24 - 9.30.25	\$117,000			\$95,751	\$21,249
<i>Subtotal</i>		\$234,000	\$0	\$97,679	\$115,072	\$21,249
Other Government Revenue Total		\$7,199,000	\$1,290,924	\$3,192,759	\$4,090,675	\$368,216
<i>Other Revenue</i>						
Irvine Capacity Building	12.1.23 - 12.31.25	\$500,000		\$51,106	\$263,269	\$156,610
Other Revenue Total		\$500,000	\$0	\$51,106	\$263,269	\$156,610



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

AGENDA SUBMITTAL

<p>SUBJECT Review and Approval of Three Contracts to Build Community Awareness and Pathways into the Bioeconomy Industries or Biotechnology Careers, Funded by the American Rescue Plan Act (ARPA), Not to Exceed \$150,000, for a period of October 1, 2024 through May 31, 2025</p>	<p>MEETING DATE September 20, 2024</p>	<p>AGENDA ITEM X.D</p>
<p>FROM Heather Henry, President/Executive Director</p>	<p>ACTION REQUIRED YES ✓ NO</p>	<p>ATTACHMENTS A-C</p>

RECOMMENDATION

It is recommended that the Board of Directors approve staff’s recommendation to approve the three (3) contracts to build community awareness and pathways into the bioeconomy industries or biotechnology careers, funded under the American Rescue Plan Act (ARPA) and Jobs for the Future seed funding, for a period of October 1, 2024 through May 31, 2025. These contracts will not be eligible for renewal through ARPA funding.

It is also recommended that the Board authorize the President/Executive Director to finalize and sign these contracts after it has been reviewed by County Counsel and approved as to form, and make administrative changes, as needed. Once approved, the contracts will be submitted to the Solano County Administrator’s Office for final approval and execution.

DISCUSSION

The Workforce Development Board (WDB) of Solano County received funds from the Department of Treasury, passed through the County of Solano, to provide career outreach designed to support job seekers along in-demand career pathways to the community of Solano County.

RFQ Process

The WDB released a Request for Quotes (RFQ) for American Rescue Plan Act (ARPA) Community Pathways into Bioeconomy/Biotechnology Careers on June 28, 2024, with funding up to \$200,000. Contracted activities must be completed by May 31, 2025. The RFQ was disseminated to over sixty (60) organizations and posted on WDB’s website. Proposals were due July 26, 2024 in which five (5) were received; Lady Echelon, Center for Urban Excellence, Forus Transport, Gladeo and RepresentEd.

All proposals received a threshold review with four (4) meeting the minimum qualifications for consideration. Staff and one community representative reviewed each qualified proposal and completed an evaluation form.

Applicants could receive up to 105 points, including up to 5 bonus points for proposing to conduct activities targeted in Vallejo. Below is a breakdown of the aggregate scores for each proposal received:

Proposer	Total Points Possible	Average Score
Center for Urban Excellence	105	92.3
Gladeo	105	91.6
Lady Echelon	105	87.6
RepresentEd	105	80.3

During the selection process, reviewers also considered proposed activities, ability to meet project milestones/outcomes with activities completed by May 31, 2025, the location of services, and the project aligning with the goal to invest in a community-based equitable pathway for Solano residents into bioeconomy industries and occupations. Based on the proposals submitted, evaluations, and scores, the following organizations have proven to meet the WDB’s specifications and needs: Center for Urban Excellence, Gladeo and Lady Echelon. An additional contract with RepresentEd will be developed with remaining funds.

As part of this agenda item, each attachment for its respective organization includes the Cover Sheet, Scope of Work (Exhibit A), and Budget (Exhibit B). The contract General Terms and Conditions (Exhibit C) and the Special Terms and Conditions (Exhibit D) remain the standard exhibits and therefore are not included in the attachment.

Contract documents are provided for the following entities:

- Center for Urban Excellence – Attachment A
- Gladeo – Attachment B
- Lady Echelon Project - Attachment C

These contracts were not reviewed by the Planning & Oversight Committee due to the timing of developing the Scope of Work and Budgets for each contractor.

ALTERNATIVES: The Board could choose not to approve one or more of these contracts, overall or in part, and instead provide staff with direction to reevaluate additional proposals for consideration or to have the Planning and Oversight Committee review the contracts at their next meeting. However, the organizations selected are ensuring various types of community awareness strategies that meet the goals of this grant. Further delay will shorten the time allowed for successful implementation of services.

AGENCY BUDGET IMPACT: The necessary funding to cover the cost of this contract is included in the FY24-25 budget through American Rescue Plan Act funding.

REPORT PREPARED BY

Heather Henry, President/Executive Director. Please contact Heather at 707-863-3501 if you have any questions regarding the information in this report.

**SERVICE
AGREEMENT
CONTRACT**



For WDB Use Only
**Contract No.
PY-25-002**

1. This Contract is entered into between the Workforce Development Board (WDB) of Solano County and Center for Urban Excellence (“Contractor”) for American Recovery Plan Act (ARPA) to build community awareness and pathways into the bioeconomy industries and biotechnology careers.
2. The term of this Contract is: October 1, 2024 through May 31, 2025.
3. The Maximum amount of this contract is: \$83,333

The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of this Contract:

- Exhibit A – Scope of Work
- Exhibit B – Budget Detail and Payment Provisions
- Exhibit C – General Terms and Conditions
- Exhibit D – ARPA Special Terms and Conditions

Workforce Development Board

Center for Urban Excellence

BY: _____
Authorized Signature

BY: _____
Authorized Signature

NAME: Heather Henry

NAME: Reina Robinson

TITLE: President/Executive Director

TITLE: CEO

DATE: _____

DATE: _____

ADDRESS: 500 Chadbourne Road, Suite A
Fairfield, CA 94534

ADDRESS: PO Box 5543
Vallejo, CA 94590

APPROVED AS TO FORM

COUNTY OF SOLANO

Solano County Counsel Signature

BY: _____
Authorized Signature

NAME: William Emlen

TITLE: County Administrator

DATE: _____

ADDRESS: 675 Texas Street, Suite 6500
Fairfield, CA 94533

EXHIBIT A SCOPE OF WORK

I. SERVICE DELIVERY

A. GENERAL EXPECTATIONS OF THE CONTRACTOR

1. Build community awareness and entry point access into the bioeconomy industries or biotechnology careers in Solano County, with a focus on targeted demographic groups.
2. Increase opportunities for low education, low-income youth and young adults in Vallejo for bioeconomy careers, such as Environmental, Marine and Field Technicians, and Research and Laboratory Assistants.
3. Follow American Rescue Plan Act (ARPA) and Workforce Development Board (WDB) of Solano County's programmatic and administrative guidelines.
4. Document, measure, and track success in meeting contract outcomes.

B. SERVICE ACTIVITIES

Contractor will provide the service activities as outlined below to accomplish the goal of the ARPA Community Pathways into Bioeconomy Careers initiative:

1. ***Skill Workshops*** –Contractor will provide weekly workshops in the spring of 2025 that focus on essential skills required for entry-level bioeconomy careers, including laboratory techniques, environmental monitoring, data analysis, and sustainable practices.

Facilitated career advising, provided by Cal Maritime faculty and assisted by cadet peer mentors, will include topics such as basic biotechnology, marine science, environmental sustainability, and oceanography in order to equip participants with foundational skills and knowledge necessary for bioeconomy careers.

2. ***Informational Interviews and Guest Speakers*** – Contractor will organize informational interviews and sessions with guest speakers from the bioeconomy sector to provide participants with insights into various careers and professional experiences. Sessions may include questions and answers, interactive discussions, and engaging hands-on activities to help participants understand the landscape of bioeconomy careers.
3. ***Industry Tours*** – Contractor will organize tours of bioeconomy / biotechnology companies and research facilities to provide participants with a firsthand look at workplace operations. Tours may include Solano Community College's Biotechnology Program and Cal Maritime's Oceanography Program.
4. ***Service Methodology*** –
 - ***Outreach to Targeted Populations*** – outreach and engagement efforts will be focused on ARPA-designated areas within Fairfield and Vallejo. Strategies include participating in community events and local gatherings, collaborating with local youth stakeholders, partnering with schools that serve a high percentage of low-income and minority students, and use of social media platforms.

- *Cultural Competence* – messaging and services must be designed to be youth accessible and culturally relevant to engage minority groups and low-income households. Messaging content must reflect the diverse backgrounds of the targeted population and should highlight success stories from minority groups in the bioeconomy sector. Contract will include current youth members in the design of messaging material.
- *Continuous Improvement* – Contract will incorporate a feedback system to continuously improve engagement strategies. Strategies will include surveys and focus groups of participants.

II. CONTRACTOR RESPONSIBILITIES

A. AVAILABILITY TO PERFORM SERVICES

1. Contractor will:

- Deliver program services in accordance with the negotiated scope of work and budget;
- Provide and train qualified staff to plan and administer all contracted services;
- Provide program sustainability for duration of the Contract;
- Provides services during scheduled business days and/or hours appropriate to program participants' needs;
- Provide internal monitoring and oversight of program activities and requirements; and
- Provide services that adhere to all applicable policies and procedures promulgated by the WDB, the County of Solano, and the Department of Treasury relating to contractor's duties and responsibilities pursuant to the terms and conditions of this Contract.

B. CONTRACTOR'S RESOURCES

Contractor will implement and coordinate ARPA Community Pathways into Bioeconomy Careers services at its site(s) and shall provide all necessary instructions, supervision, and supplies for program activities. Contractor shall maintain sufficient resources, including computer technology, to deliver the services and perform necessary administrative functions throughout the term of this contract.

C. LOCATION OF SERVICES

Contractor will locate services within the county, and where feasible, ensure employment services activities take place within reasonable accessibility of public transportation and provide adequate, accessible free parking spaces for client use as needed.

In addition, facilities utilized will meet accessibility standards under the Americans with Disabilities Act (ADA). Contractor will provide equal access for individuals with disabilities for all public areas. These areas will be clearly marked with adequate signage related to accessibility of space and programs.

D. CONFIDENTIALITY

All correspondence, communication, and reporting mechanisms will adhere to WDB policies to safeguard the client's confidentiality. No information that would personally identify the client may be included in email correspondence. See *WDB 2018-01 Use and Confidentiality of Participant Personally Identifiable Information (PII) Policy* for further details.

E. COMMUNICATION AND MATERIALS

The Contractor will maintain regular communication with WDB staff. As part of this communication, the Contractor must inform the WDB of any special events under the ARPA umbrella of services prior to implementation.

Any documents connected with the contract and that use Contractor funds from the WDB must include the logo of the County of Solano, as well as the statement "Made possible by the funding from the County of Solano." Appropriate documents include websites, news releases, brochures, newsletters, flyers, advertisements, public service announcements, posters, and any other public communication items. In addition, appropriate accessibility and accommodation information must be included in printed and digital collateral materials.

F. DOCUMENTATION AND RECORDS

Fiscal documentation of expenditures must be kept to a level that allows the tracing of federal funds to a level adequate to ensure funds haven't been spent, according to the terms and conditions of this contract. All documentation must be clearly identifiable and readily accessible.

The WDB and County of Solano shall have full and free access to such documents and records at all times during normal business hours, including the right to inspect, copy, audit, and make records from such records. Such records shall be maintained for a period of three (3) years following completion of the services hereunder, and the WDB and the County of Solano shall have access to such records in the event an audit is required.

All reports, records, documents, and other materials prepared by the Contractor in the performance of this contract shall be the property of the WDB and shall be delivered upon request of the WDB. Contractor shall have no claim for further employment or additional compensation as a result of the exercise by the WDB of its full rights of ownership of the documents and materials hereunder. Contractor may retain copies of such documents for its own use and shall have an unrestricted right to use the concepts embodied therein.

G. REPORTING REQUIREMENTS

The Contractor must submit updates on service activities at time of invoice for the period invoiced.

Reporting elements may include:

- Progress towards contract quantitative outcomes
- A brief narrative on project activities and progress towards project goals
- Any applicable success stories to share
- Any challenges or technical assistance needed

H. CONTRACT DELIVERABLES

Contractor will provide the following deliverables over the course of the contract from September 1, 2024 through May 31, 2025.

Deliverable	Outcome
Finalize Propulsion Lab program plan	Plan finalized by October 31, 2024
Launch outreach campaign	Outreach launched by October 31, 2024
Conduct workshops on basic biotechnology and marine science	At least 3 workshops on basic biotechnology topics held
Host information interviews and guest speaker sessions	At least 3 interviews or sessions held
Facilitate industry and research facility tours	At least 2 tours held
Conduct advanced biotechnology workshops	At least 2 workshops on advanced biotechnology topics held

If services consistently do not meet contract deliverables, the contract may be at risk of corrective action or termination.

III. WDB RESPONSIBILITIES

The WDB staff will be responsible for the following:

1. Provide technical assistance to contractor staff in the areas of ARPA compliance, as needed;
2. Provide technical assistance and support in identifying and connecting with industry companies and research facilities;
3. Coordinate strategies and services across WDB’s bioeconomy initiatives; and
4. Process payments for services.

The roles and responsibilities of the WDB and Contractor may be refined and changed due to changes in Federal, State or Local law, regulations, or policies relating to ARPA upon written notification and in accordance with section 13 and 26 in Exhibit C.

EXHIBIT B
BUDGET DETAIL AND PAYMENT PROVISIONS

BUDGET SUMMARY (Cost Categories)	Contract Term	TOTAL
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PERSONNEL <i>(Includes Salary + Benefits)</i>		
Salaries and Benefits	\$26,557	\$26,557
SUBTOTAL PERSONNEL:	\$26,557	\$26,557

PARTICIPANT COSTS		
Participant Stipends	\$15,000	\$15,000
Participant Transportation	\$6,225	\$6,225
Support Services	\$3,000	\$3,000
SUBTOTAL PARTICIPANT COSTS:	\$24,225	\$24,225

PROGRAM OPERATING COSTS		
Cal Maritime Costs	\$17,618	\$17,618
Program Supplies	\$5,000	\$5,000
Communication and Outreach	\$1,600	\$1,600
SUBTOTAL OPERATING COSTS:	\$24,218	\$24,218

ADMINISTRATIVE COSTS <i>(No More Than 10%)</i>		
Administrative Costs	\$8,333	\$8,333

CONTRACT TOTALS:	\$83,333	\$83,333
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1. The WDB agrees to pay the Contractor for services upon the presentation of an appropriate invoice and documents supporting the deliverables as defined in the Scope of Work to be performed. The Contractor shall submit monthly invoices detailing work performed for each deliverable detailed in the Scope of Work (Exhibit A) and amount payable to the WDB's Executive Director/President, or designee. Monthly invoices for payment should be submitted to the WDB by the 15th day of the subsequent month. The payment shall be made only after the services required under this contract have been performed to the satisfaction of the Executive Director/President or designee, and the deliverables described in Exhibit A, Scope of Work have been accepted in writing by the Executive Director/President or his/her designee.
2. Contractor must request approval for transfers between budget line items, which are set forth in Exhibit B (Budget Summary) when the cumulative amount of such transfers exceed 10% of the budget total amount. Requests for transfers between budget line items must be presented to the WDB in writing, which approval may be withheld in the sole and absolute discretion of WDB. WDB may authorize the addition of budget line items for transfers under this section, provided that the line item added does not substantially change the scope of services to be provided under this Contract and does not increase the total contract amount.

3. Contractor shall provide any additional documentation as required by WDB at any time in order to substantiate Contractor's claims for payment. WDB may elect to withhold payment for failure by Contractor to provide such documentation required by WDB.
4. Contractor must maintain backup documentation onsite that supports the financial data submitted to the WDB. Contractor shall make this backup documentation available upon request of the WDB. Financial data (invoice) submitted by Contractor must meet the criteria set forth in section E below.
5. Allowable operating expenses are defined as necessary expenditures exclusive of personnel salaries, benefits, equipment, or payments to subcontractors. Such expenses include specific items directly charged to the project. The expenses must be grant-related (i.e., to further the program objectives as defined in the grant award) and be incurred (realized) during the grant period. County reserves the right to make the final determination if an operating expense is allowable and necessary.
6. The maximum payment under the terms of this contract shall under no circumstances, exceed **\$83,333** for the related expenses unless this contract is modified in accordance with Section 26 in Exhibit C.

SERVICE AGREEMENT CONTRACT



For WDB Use Only
Contract No. PY-25-003

1. This Contract is entered into between the Workforce Development Board (WDB) of Solano County and Gladeo Inc. (“Contractor”) for American Recovery Plan Act (ARPA) to build community awareness and pathways into the bioeconomy industries and biotechnology careers.
2. The term of this Contract is: October 1, 2024 through May 31, 2025.
3. The Maximum amount of this contract is: \$53,500

The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of this Contract:

- Exhibit A – Scope of Work
- Exhibit B – Budget Detail and Payment Provisions
- Exhibit C – General Terms and Conditions
- Exhibit D – ARPA Special Terms and Conditions

Workforce Development Board

Gladeo Inc.

BY: _____
Authorized Signature

BY: _____
Authorized Signature

NAME: Heather Henry

NAME: Michelle Cho

TITLE: President/Executive Director

TITLE: Co-Founder/CEO

DATE: _____

DATE: _____

ADDRESS: 500 Chadbourne Road, Suite A
Fairfield, CA 94534

ADDRESS: 3110 Main Street Building C
Santa Monica, CA 90405

APPROVED AS TO FORM

COUNTY OF SOLANO

Solano County Counsel Signature

BY: _____
Authorized Signature

NAME: William Emlen

TITLE: County Administrator

DATE: _____

ADDRESS: 675 Texas Street, Suite 6500
Fairfield, CA 94533

EXHIBIT A SCOPE OF WORK

I. SERVICE DELIVERY

A. GENERAL EXPECTATIONS OF THE CONTRACTOR

1. Build community awareness and entry point access into the bioeconomy industries or biotechnology careers in Solano County, with a focus on targeted demographic groups.
2. Launch the “Gladeo for Solano County Biotechnology / Bioeconomy” platform, leveraging Gladeo’s Platform-as-a-Service model.
3. Follow American Rescue Plan Act (ARPA) and Workforce Development Board (WDB) of Solano County’s programmatic and administrative guidelines.
4. Document, measure, and track success in meeting contract outcomes.

B. SERVICE ACTIVITIES

Contractor will increase public awareness of biotechnology and bioeconomy career opportunities that encourages and inspires individuals in a culturally relevant way, targeting minority populations, individuals under the age of 35, low-income households and communities, and individuals with low-levels of education.

Contractor will accomplish this goal through creating a platform focusing on bioeconomy and biotechnology career pathways that will demystify these often unfamiliar and hard to navigate careers. Contractor will fully manage, host, and maintain the contracted platform.

Contractor will work with the WDB to engage the community in the development of the platform through stakeholder identification and customized outreach and communication. To support local staff and organizations using the platform, Contractor will virtually train interested organizations on the tools within the platform, as needed.

The platform will include the following features:

1. ***Biotechnology Careers Quiz*** – Contractor will create a Gladeo Biotech Quiz as a foundational assessment (aligned with Holland’s RIASEC model) to help users uncover their core personality traits and interests.
2. ***Stories of Diverse Biotech and Bioeconomy Professionals*** – Contractor will collect stories of professionals from diverse racial, ethnic, gender, and socioeconomic backgrounds who are in a variety of biotech or bioeconomy careers. Contractor will create 3-5 career videos featuring individuals working in Solano County’s biotech / bioeconomy fields, targeting individuals representing the WDB’s identified underrepresented groups.
3. ***Career Profiles*** – Contractor will develop and include on the platform proprietary, in-depth, real-world career profiles in the biotech and bioeconomy sectors that are digitized from real-world informational interviews with professionals. These profiles will include information to help participants understand the career, such as a typical day at work; education, skills, and certification requirements; career progression maps; tips on how to land a first job; and/or links to helpful resources and online courses.

4. ***Career Progression Maps*** – Contractor will develop and include on the platform flow charts that show possible career paths in various biotech/bioeconomy careers.
5. ***Employer Pages*** – Contractor will research, gather, and upload information on Solano County’s employers in collaboration with the WDB. Employer pages may include their website, company description, number of employees, headquarters, social links, video upload for company videos, and employee career videos that are produced through this contract.
6. ***Regional Educational and Training Program Finder*** – Contractor will develop and include on the platform a Program Finder which will include applicable education, training, and apprenticeship programs in the region. The Program Finder will be searchable by keyword searches, applicable career pathway, and location of program. Program information may include program description, program length, type of program completion, location, cost (including application fees), training format, and requirements needed to enter program.
7. ***Individual User Access*** – The platform will include personal user accounts and digital dashboards, which will allow visitors to manage their personal account information, access their quiz results, see recently viewed spotlight content, and manage the careers and industries they “follow” on the platform.
8. ***Personalized Newsfeed*** – The platform will include a personalized newsfeed that recommends content based on the user’s unique demographics, career interests, and industry levels. Community partners will be able to post internships, apprenticeships, networking events, webinars, and other career building opportunities directly into the platform.

II. CONTRACTOR RESPONSIBILITIES

A. AVAILABILITY TO PERFORM SERVICES

1. Contractor will:

- a. Deliver program services in accordance with the negotiated scope of work and budget;
- b. Provide and train qualified staff to plan and administer all contracted services;
- c. Provide program sustainability for duration of the Contract;
- d. Provide internal monitoring and oversight of program activities and requirements; and
- e. Provide services that adhere to all applicable policies and procedures promulgated by the WDB, the County of Solano, and the Department of Treasury relating to contractor’s duties and responsibilities pursuant to the terms and conditions of this Contract.

B. CONTRACTOR’S RESOURCES

Contractor will implement and coordinate ARPA Community Pathways into Bioeconomy Careers services at its site(s) and shall provide all necessary instructions, supervision, and

supplies for program activities. Contractor shall maintain sufficient resources, including computer technology, to deliver the services and perform necessary administrative functions throughout the term of this contract.

C. PLATFORM ACCESSIBILITY REQUIREMENTS

Contracted platform must meet the following accessibility requirements:

- Accessible and optimized for all major browsers
- Responsive to desktop, tablet, and mobile access
- WCAG, ADA, and Section 508 compliant
- California Consumer Privacy Act compliant
- Be free of charge to the public and does not place any content behind paywalls or otherwise requirement payments from users to access content

D. CONFIDENTIALITY

All correspondence, communication, and reporting mechanisms will adhere to WDB policies to safeguard the client’s confidentiality. No information that would personally identify the client may be included in email correspondence. See *WDB 2018-01 Use and Confidentiality of Participant Personally Identifiable Information (PII) Policy* for further details.

E. COMMUNICATION AND MATERIALS

The Contractor will maintain regular communication with WDB staff and provide updates to WDB staff on contract progress and outcomes.

Any documents connected with the contract and that use Contractor funds from the WDB must include the logo of the County of Solano, as well as the statement “Made possible by the funding from the County of Solano.” Appropriate documents include websites, news releases, brochures, newsletters, flyers, advertisements, public service announcements, posters, and any other public communication items.

F. DOCUMENTATION AND RECORDS

Fiscal documentation of expenditures must be kept to a level that allows the tracing of federal funds to a level adequate to ensure funds haven’t been spent fraudulently, according to the terms and conditions of this contract. All fiscal back-up documentation must be clearly identifiable and readily accessible.

The WDB and County of Solano shall have full and free access to such documents and records at all times during normal business hours, including the right to inspect, copy, audit, and make records from such records. Such records shall be maintained for a period of three (3) years following completion of the services hereunder, and the WDB and the County of Solano shall have access to such records in the event an audit is required.

All reports, records, documents, and other materials prepared by the Contractor in the performance of this contract shall be the property of the WDB and shall be delivered upon request of the WDB. Contractor shall have no claim for further employment or additional compensation as a result of the exercise by the WDB of its full rights of ownership of the documents and materials hereunder. Contractor may retain copies of such documents for its own use and shall have an unrestricted right to use the concepts embodied therein.

G. REPORTING REQUIREMENTS

The Contractor must submit updates on service activities at time of invoice for the period invoiced.

Reporting elements may include:

- Progress towards contract quantitative outcomes
- A brief narrative on project activities and progress towards project goals
- Any applicable success stories to share
- Any challenges or technical assistance needed

H. CONTRACT DELIVERABLES

Contractor will provide the following deliverables over the course of the contract from September 1, 2024 through May 31, 2025.

Deliverable	Outcome
Launch of Platform	Platform launched by October 31, 2024
Creation of Marketing Assets	Assets completed by November 30, 2024
Professional Development Training Held	Up to 4 trainings held for community partners and staff

If services consistently do not meet contract deliverables, the contract may be at risk of corrective action or termination.

III. WDB RESPONSIBILITIES

The WDB staff will be responsible for the following:

1. Provide technical assistance to contractor staff in the areas of ARPA compliance, as needed;
2. Provide technical assistance and support in identifying and connecting with industry companies and stakeholders;
3. Coordinate strategies and services across WDB’s bioeconomy initiatives; and
4. Process payments for services.

The roles and responsibilities of the WDB and Contractor may be refined and changed due to changes in Federal, State or Local law, regulations, or policies relating to ARPA upon written notification and in accordance with section 13 and 26 in Exhibit C.

**EXHIBIT B
BUDGET DETAIL AND PAYMENT PROVISIONS**

BUDGET SUMMARY (Cost Categories)	Contract Term	TOTAL
Platform	\$35,000	\$35,000
Five Career Videos – billed at time of video completion	\$2,500 / video	\$12,500
Community Outreach	\$5,000	\$5,000
Up to Four Train the Trainer Webinars – billed after webinar completion	\$250 / session	\$1,000
CONTRACT TOTALS:		\$53,500

1. The WDB agrees to pay the Contractor for services upon the presentation of an appropriate invoice and documents supporting the deliverables as defined in the Scope of Work to be performed. The Contractor shall submit monthly invoices detailing work performed for each deliverable detailed in the Scope of Work (Exhibit A) and amount payable to the WDB’s Executive Director/President, or designee. Monthly invoices for payment should be submitted to the WDB by the 15th day of the subsequent month. The payment shall be made only after the services required under this contract have been performed to the satisfaction of the Executive Director/President or designee, and the deliverables described in Exhibit A, Scope of Work have been accepted in writing by the Executive Director/President or his/her designee.
2. Contractor must request approval for transfers between budget line items, which are set forth in Exhibit B (Budget Summary) when the cumulative amount of such transfers exceed 10% of the budget total amount. Requests for transfers between budget line items must be presented to the WDB in writing, which approval may be withheld in the sole and absolute discretion of WDB. WDB may authorize the addition of budget line items for transfers under this section, provided that the line item added does not substantially change the scope of services to be provided under this Contract and does not increase the total contract amount.
3. Contractor shall provide any additional documentation as required by WDB at any time in order to substantiate Contractor’s claims for payment. WDB may elect to withhold payment for failure by Contractor to provide such documentation required by WDB.
4. Contractor must maintain backup documentation onsite that supports the financial data submitted to the WDB. Contractor shall make this backup documentation available upon request of the WDB. Financial data (invoice) submitted by Contractor must meet the criteria set forth in section E below.
5. Allowable operating expenses are defined as necessary expenditures exclusive of personnel salaries, benefits, equipment, or payments to subcontractors. Such expenses include specific items directly charged to the project. The expenses must be grant-related (i.e., to further the program objectives as defined in the grant award) and be incurred (realized) during the grant period. County reserves the right to make the final determination if an operating expense is allowable and necessary.
6. The maximum payment under the terms of this contract shall under no circumstances, exceed **\$53,500** for the related expenses unless this contract is modified in accordance with Section 26 in Exhibit C.

SERVICE AGREEMENT CONTRACT



For WDB Use Only
Contract No. PY-25-004

1. This Contract is entered into between the Workforce Development Board (WDB) of Solano County and Lady Echelon Project, Inc. (“Contractor”) for American Recovery Plan Act (ARPA) to build community awareness and pathways into the bioeconomy industries and biotechnology careers.
2. The term of this Contract is: October 1, 2024, through May 31, 2025.
3. The Maximum amount of this contract is: \$10,050

The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of this Contract:

- Exhibit A – Scope of Work
- Exhibit B – Budget Detail and Payment Provisions
- Exhibit C – General Terms and Conditions

Workforce Development Board

Lady Echelon Project, Inc.

BY: _____
Authorized Signature

BY: _____
Authorized Signature

NAME: Heather Henry

NAME: Ada Brown

TITLE: President/Executive Director

TITLE: Chief Executive Officer

DATE: _____

DATE: _____

ADDRESS: 500 Chadbourne Road, Suite A
Fairfield, CA 94534

ADDRESS: 236 Georgia Street, Suite 102
Vallejo, CA 94590

APPROVED AS TO FORM

COUNTY OF SOLANO

Solano County Counsel Signature

BY: _____
Authorized Signature

NAME: William Emlen

TITLE: County Administrator

DATE: _____

ADDRESS: 675 Texas Street, Suite 6500
Fairfield, CA 94533

**EXHIBIT A
SCOPE OF WORK**

I. SERVICE DELIVERY

A. GENERAL EXPECTATIONS OF THE CONTRACTOR

1. Build community awareness and entry point access into the bioeconomy industries or biotechnology careers in Solano County, with a focus on targeted demographic groups.
2. Organize, facilitate, and host a biotech fair in downtown Vallejo to engage and empower community members, particularly those from underrepresented backgrounds, to pursue careers in the bioeconomy.
3. Follow Workforce Development Board (WDB) of Solano County’s programmatic and administrative guidelines.
4. Document, measure, and track success in meeting contract outcomes.

B. SERVICE ACTIVITIES

Contractor will increase public awareness of biotechnology and bioeconomy career opportunities by hosting a biotech fair in downtown Vallejo, targeting community members from underrepresented backgrounds. The event will include a series of workshops, hands-on educational opportunities, vendor booths, compelling guest speakers representing industry professions, and food and entertainment for the public.

Biotech Fair elements will include the following features:

1. ***Workshop Series*** – Contractor will coordinate a series of workshops that will cover a wide range of topics, from cutting-edge laboratory techniques to the latest advancements in biotechnology research and development. Workshop attendees will have the opportunity to engage in hands-on activities or interactive demonstrations. At least one workshop will be held on job search related topics.
2. ***Vendor Booths*** – Contractor will invite, register, and manage vendor booths for the event. These booths will serve as a gateway for interested community members to meet with employers, explore various specializations within the field, and learn about opportunities for employment or training.
3. ***Entertainment*** – Contractor will host, coordinate, and schedule entertainment and guest lectures from industry professionals as part of the event.
4. ***Follow-Up Communication*** – Following the event, Contractor will continue engaging with interested attendees throughout the year and partner individuals with a mentor where appropriate and feasible.

Contractor’s methodology for engaging the community equitably includes:

1. Conducting a comprehensive assessment of the community to identify all relevant stakeholders, including local residents, businesses, and marginalized communities. Tools used may include surveys, focus groups, and public meetings to determine and understand the community’s needs, concerns, and aspirations.

2. Provide information brochures or flyers and promote the event on digital platforms to disseminate information on the project throughout Vallejo.
3. Involve the community in the planning and decision-making process through the establishment of an Advisory Council, participatory workshops, and information sharing meetings.
4. Dissemination of a feedback and evaluation system for attendees and participants to identify areas for improvement and ensure the engagement process remains responsive to the community's evolving needs.

II. CONTRACTOR RESPONSIBILITIES

A. AVAILABILITY TO PERFORM SERVICES

1. Contractor will:

- a. Deliver program services in accordance with the negotiated scope of work and budget;
- b. Provide and train qualified staff to plan and administer all contracted services;
- c. Provide program sustainability for duration of the Contract;
- d. Provide internal monitoring and oversight of program activities and requirements; and
- e. Provide services that adhere to all applicable policies and procedures promulgated by the WDB and the County of Solano relating to contractor's duties and responsibilities pursuant to the terms and conditions of this Contract.

B. CONTRACTOR'S RESOURCES

Contractor will implement and coordinate ARPA Community Pathways into Bioeconomy Careers services at its site(s) or another secured site and shall provide all necessary instructions, supervision, and supplies for program activities. Contractor shall maintain sufficient resources, including computer technology, to deliver the services and perform necessary administrative functions throughout the term of this contract.

C. LOCATION OF SERVICES

Contractor will locate services within the county, and where feasible, ensure services activities take place within reasonable accessibility of public transportation and provide adequate, accessible free parking spaces for client use as needed.

In addition, facilities utilized will meet accessibility standards under the Americans with Disabilities Act (ADA). Contractor will provide equal access for individuals with disabilities for all public areas. These areas will be clearly marked with adequate signage related to accessibility of space and programs.

D. CONFIDENTIALITY

All correspondence, communication, and reporting mechanisms will adhere to WDB policies to safeguard the client's confidentiality, as applicable. No information that would personally identify the client may be included in email correspondence. See *WDB 2018-01*

Use and Confidentiality of Participant Personally Identifiable Information (PII) Policy for further details.

E. COMMUNICATION AND MATERIALS

The Contractor will maintain regular communication with WDB staff and provide updates to WDB staff on contract progress and outcomes.

Any documents connected with the contract and that use Contractor funds from the WDB must include the logo of the WDB. Appropriate documents include websites, news releases, brochures, newsletters, flyers, advertisements, public service announcements, posters, and any other public communication items. In addition, appropriate accessibility and accommodation information must be included in printed and digital collateral materials.

F. DOCUMENTATION AND RECORDS

Fiscal documentation of expenditures must be kept to a level that allows the tracing of funds to a level adequate to ensure funds have been spent according to the terms and conditions of this contract. All documentation must be clearly identifiable and readily accessible.

The WDB and County of Solano shall have full and free access to such documents and records at all times during normal business hours, including the right to inspect, copy, audit, and make records from such records. Such records shall be maintained for a period of three (3) years following completion of the services hereunder, and the WDB and the County of Solano shall have access to such records in the event an audit is required.

All reports, records, documents, and other materials prepared by the Contractor in the performance of this contract shall be the property of the WDB and shall be delivered upon request of the WDB. Contractor shall have no claim for further employment or additional compensation as a result of the exercise by the WDB of its full rights of ownership of the documents and materials hereunder. Contractor may retain copies of such documents for its own use and shall have an unrestricted right to use the concepts embodied therein.

G. REPORTING REQUIREMENTS

The Contractor must submit updates on service activities at time of invoice for the period invoiced.

Reporting elements may include:

- Progress towards contract quantitative outcomes
- A brief narrative on project activities
- Any applicable success to share
- Any challenges or technical assistance needed

H. CONTRACT DELIVERABLES

Contractor will provide the following deliverables over the course of the contract from September 1, 2024 through May 31, 2025.

Deliverable	Outcome
Form a dedicated planning committee	Planning committee formed
Submit special event paperwork through the City of Vallejo	Location in Vallejo secured for event
Develop sponsorship packages and formalize partnerships	Sponsorship packages developed and shared with WDB
Participation of keynote speakers, panelists, and workshop hosts confirmed	At least 3 speakers identified
Host event, including management of registration desk and facilitation of the day’s schedule	Event held
Solicit feedback and evaluation of event	Aggregate results of pre and post survey are submitted to the WDB

If services consistently do not meet contract deliverables, the contract may be at risk of corrective action or termination.

III. WDB RESPONSIBILITIES

The WDB staff will be responsible for the following:

1. Provide technical assistance to contractor staff in the areas of compliance, as needed;
2. Provide technical assistance and support in identifying and connecting with industry companies and stakeholders;
3. Coordinate strategies and services across WDB’s bioeconomy initiatives, as appropriate; and
4. Process payments for services.

The roles and responsibilities of the WDB and Contractor may be refined and changed due to changes in Federal, State or Local law, regulations, or policies upon written notification.

**EXHIBIT B
BUDGET DETAIL AND PAYMENT PROVISIONS**

BUDGET SUMMARY (Cost Categories)	Contract Term	TOTAL
Personnel and Contracted Staff, including travel and accommodation for speakers	\$3,100	\$3,100
Marketing Materials	\$450	\$450
Event Supplies (to include food and drink, porta potty, workshop materials and supplies, family engagement rentals, audio/visual equipment, equipment rental, and emergency supplies)	\$4,100	\$4,100
Fees and Insurance (to include Vallejo permit fee for street closure, other permits, and insurance)	\$2,400	\$2,400
CONTRACT TOTALS:	\$10,050	\$10,050

1. The WDB agrees to pay the Contractor for services upon the presentation of an appropriate invoice and documents supporting the deliverables as defined in the Scope of Work to be performed. The Contractor shall submit invoices detailing work performed for each deliverable detailed in the Scope of Work (Exhibit A) and amount payable to the WDB's Executive Director/President, or designee. The payment shall be made only after the services required under this contract have been performed to the satisfaction of the Executive Director/President or designee, and the deliverables described in Exhibit A, Scope of Work have been accepted in writing by the Executive Director/President or his/her designee.
2. Contractor must request approval for transfers between budget line items, which are set forth in Exhibit B (Budget Summary) when the cumulative amount of such transfers exceed 10% of the budget line item amount. Requests for transfers between budget line items must be presented to the WDB in writing, which approval may be withheld in the sole and absolute discretion of WDB. WDB may authorize the addition of budget line items for transfers under this section, provided that the line item added does not substantially change the scope of services to be provided under this Contract and does not increase the total contract amount.
3. Contractor shall provide any additional documentation as required by WDB at any time in order to substantiate Contractor's claims for payment. WDB may elect to withhold payment for failure by Contractor to provide such documentation required by WDB.
4. Contractor must maintain backup documentation onsite that supports the financial data submitted to the WDB. Contractor shall make this backup documentation available upon request of the WDB.
5. Allowable operating expenses are defined as necessary expenditures exclusive of personnel salaries, benefits, equipment, or payments to subcontractors. Such expenses include specific items directly charged to the project. The expenses must be grant-related (i.e., to further the program objectives as defined in the grant award) and be incurred (realized) during the grant period. County reserves the right to make the final determination if an operating expense is allowable and necessary.

6. The maximum payment under the terms of this contract shall under no circumstances, exceed **\$10,050** for the related expenses unless this contract is modified in accordance with Section 26 in Exhibit C.



WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

AGENDA SUBMITTAL

SUBJECT Approval to Renew the Fairfield WDB Office Lease for an Additional Five (5) Year Term Effective October 1, 2024 through September 30, 2029 for 16,033 Square Feet at 500 Chadbourne Road in Fairfield	MEETING DATE September 20, 2024	AGENDA ITEM X.E
FROM Heather Henry, President/Executive Director	ACTION REQUIRED YES ✓ NO	ATTACHMENTS A, B

RECOMMENDATION

It is recommended that the Board of Directors take the following actions:

1. Approve the renewal of the WDB’s Fairfield office lease for an additional five (5) year term effective October 1, 2024 through September 30, 2029 at 500 Chadbourne Road in Fairfield, totaling 16,033 rentable square feet.
2. Authorize the President/Executive Director to finalize the lease agreement and sign the Addendum to the Lease Agreement after it has been reviewed by County Counsel approved by the Solano County Board of Supervisors.

DISCUSSION

At the March 22, 2019 Board of Directors meeting, the relocation of WDB’s Fairfield office from 320 Campus Lane to 500 Chadbourne Road was approved. The office was officially relocated on June 1, 2019 and an original lease was approved and signed.

The initial lease offered an option to renew for five (5) additional and consecutive years.

Proposed Lease Renewal Agreement at 500 Chadbourne Road

Working with the landlord directly, a five-year, lease renewal term has been reached, as outlined in Attachment A and B.

1. New lease term to be October 1, 2024 – September 30, 2029
2. CAM to be billed at a rate of \$0.77 per square foot (\$12,345 per month). CAM includes the cost of utilities, association dues, general building maintenance and repairs (HVAC, roof, fire sprinkler, and elevator), exterior window washing, exterior security alarms, insurance, property taxes, property maintenance fees, and fiber optics data lines.
3. Monthly Base Rent (increase of 3% annually)

October 1, 2024 – September 30, 2025	\$20,135 + CAM
October 1, 2025 – September 30, 2026	\$20,740 + CAM
October 1, 2026 – September 30, 2027	\$21,362 + CAM
October 1, 2027 – September 30, 2028	\$22,003 + CAM
October 1, 2028 – September 30, 2029	\$22,663 + CAM

5. Lease Renewal Option

The WDB will have a 5-year lease renewal option with not less than one hundred eighty (180) days prior written notice.

ALTERNATIVES: The WDB may choose not to approve the renewal of the Lease Agreement and instead give staff direction on how to proceed; however, the agreement and benefits of the initial relocation has had favorable outcome for both staff and the community.

AGENCY BUDGET IMPACT: The current 2024-25 Budget and all future Budgets will include sufficient funds to cover these lease costs.

REPORT PREPARED BY: Heather Henry, President/Executive Director. Please contact Heather at 707-863-3501 if you have any questions regarding this information outlined in this report.



August 26, 2024

Heather Henry
 Executive Director
 Workforce Development Board of Solano County, Inc.
 500 Chadbourne Road, Suite A
 Fairfield, CA 94534

Subject: Lease Renewal Proposal – Workforce Development

Dear Ms. Henry:

Thank you for your interest in renewing the Lease at 500 Chadbourne Road, Suite A, in Fairfield, California. We, too, would like to see Workforce Development continue as our tenant for many years. We have received your request to renew your lease for 500 Chadbourne Road, Suite A. Below is an outline of our proposed terms:

- Site location:** 500 Chadbourne Road, Suite A, Fairfield, CA 94534.
- Approved Square Footage:** Suite A totaling approximately 16,033 Net Rentable Square Feet and 13,872 Net Usable Square Feet (NUSF).
- Lease and Term:** The Lease remains as a Standard Net Office Lease. The Term shall be for sixty (60) months.
- Lease Commencement:** October 1, 2024.
- Base Rental Rate and Annual Increases:** The base Monthly rent will begin at the current Rent amount, plus a 3.0% Increase (\$19,549 + 3.0% increase = \$20,135). This does NOT include Common Area Maintenance Costs. There will be annual increases of 3.0% for the life of the Lease. Below is the Rental Schedule:

Year 1 – 2024-25	\$20,135
Year 2 – 2025-26	\$20,740
Year 3 – 2026-27	\$21,362
Year 4 – 2027-28	\$22,003
Year 5 – 2028-29	\$22,663

Tenant Improvements: Lessor will arrange for the carpets in the space to be cleaned and will provide touch up painting to areas deemed necessary due to normal wear and tear. Lessor will arrange for the work to be done outside of the work hour schedule. Lessee will be responsible for clearing all furniture in the areas they want to be cleaned.

Common Area: Maintenance (CAM): The Lessee shall be responsible for the Common Area Maintenance (CAM) costs (NNN charges as defined in the Lease). The current CAM budget for 2024-25 is \$0.70 per square foot, not including Workforce's two meters for gas and electricity. With those meters included in the CAM, as currently arranged, the actual CAM expense for Workforce is **\$0.77** per square foot (\$12,345 per month). Actual expenses will continue to be trued up after each calendar year and the rate will be adjusted annually based on the actual expenses. Lessee shall be responsible for its pro-rata share of property taxes, property insurance and CAM.

Option to Renew: The Lessee shall be given one (1) Option to Renew its occupancy for five (5) additional and consecutive years with not less than one hundred eighty (180) days prior written notice. The rate shall be equal to the then 95% Fair Market Value (FMV) for comparable buildings in the market.

If you have any questions, you can contact me at 415-215-4513. Or email me at: marchus@cdidev.com
We look forward to working with you on your Lease Renewal and to another great five years of having you as our tenant.

Sincerely,



Marchus Nelson
VP, Property Management
CDI LLC



ADDENDUM II TO LEASE

Date: March 8, 2019

By and Between

Lessor: CDI LLC

Lessee: The Private Industry Council of Solano County, Inc., dba the Workforce Development Board of Solano County, Inc., a California Corporation

Property Address: 500 Chadbourne Road, Suite A, Fairfield, CA 94534
(street address, city, state, zip)

This Addendum II to the Standard Multi-Tenant Office Lease - Net (the "Addendum II") is attached to, made a part of, and incorporated into that certain Standard Multi-Tenant Office Lease - Net (the "Standard Lease") dated March 8, 2019 by and between CDI, LLC ("Lessor"), as Lessor, and The Private Industry Council of Solano County, Inc., dba the Workforce Development Board of Solano County, Inc., a California Corporation, as Lessee, covering the Premises located at 500 Chadbourne Road, Suite A, City of Fairfield, County of Solano, State of California.

If any portion of the Standard Lease, Addendum I, 1st Amendment, and 2nd Amendment should conflict with the terms of this Addendum II, the terms of this Addendum II shall control.

Defined terms not otherwise defined in this Addendum II shall have the meanings ascribed to such terms in the Standard Lease. All references to the "Lease" in the Standard Lease or in this Addendum II shall mean, collectively, the Standard Lease as modified by the 1st and 2nd Amendments, Addendum I and this Addendum II.

The LESSOR and LESSEE mutually agree to the following items to be attached to the LEASE:

Paragraph: _____

61. **PREMISES**

The site located at 500 Chadbourne Road, Suite A, Fairfield, California in the County of Solano. The Premises consists of approximately 16,033 rentable square feet and approximately 13,872 usable square feet.

62. **TERM**

Lessee elects to exercise the five-year (5) option to renew, as outlined in Paragraph 55 of Addendum I. The new "Renewal" term will commence on October 1, 2024 and expire on September 30, 2029.

63. **RENEWAL SCHEDULE AND INCREASES**

The first year Monthly Base Rent under the Renewal schedule will begin with the current amount, in the final Year of the Lease (Year 5), plus a three percent (3.0%) increase. (\$19,549 + 3.0% increase = \$20,135) There will be annual increases of three percent (3.0%) for the remaining life of the Renewal period. The schedule is as follows:

<u>Year</u>	<u>Monthly Amount</u>
1 (October 1, 2024 - September 30, 2025)	\$20,135
2 (October 1, 2025 - September 30, 2026)	\$20,740
3 (October 1, 2026 - September 30, 2027)	\$21,362
4 (October 1, 2027 - September 30, 2028)	\$22, 003
5 (October 1, 2028 - September 30, 2029)	\$22,663

64. **COMMON AREA MAINTENANCE (CAM)**

The Lessee shall remain responsible for the Common Area Maintenance (CAM) costs, NNN charges as defined in the Lease. The CAM budget for building 500, Suite A, as occupied by Workforce, and

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under current terms with the two (2) electrical meters included in CAM, is **\$0.77** per square foot (\$12,345 per month). Actual expenses will continue to be trued up after each calendar year, and the rate will be adjusted annually based on the actual expenses. Lessee shall be responsible for its pro-rata share of property taxes, property insurance and CAM.

65. OPTION TO RENEW

Lessee shall have one (1) Option to Renew its occupancy for five (5) additional and consecutive years with not less than one hundred eighty (180) days prior written notice. The rate shall be equal to the then 95% Fair Market Value (FMV) for comparable buildings in the market.

66. TENANT IMPROVEMENTS

Lessor will arrange for the carpets in the space to be cleaned and will provide touch up painting to areas deemed necessary due to normal wear and tear. Lessor will arrange for the work to be done outside of the work hour schedule. Lessee will be responsible for clearing all furniture in the areas they want to be cleaned or painted.

THIS ADDENDUM II IS TO BE EXECUTED IN COUNTERPART WITH EXECUTION ORIGINALS TO FOLLOW.

LESSOR:

CDI, LLC

LESSEE:

The Private Industry Council of Solano County, Inc., dba the Workforce Development Board of Solano County, Inc., a California Corporation

By: _____

Name: Lawrence Nelson

Title: Managing Member

Date: _____

By: _____

Name: Heather Henry

Its: Executive Director

Date: _____

In the event of any conflict between the provisions of this Addendum and the printed provisions of the Lease, this Addendum shall control.

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WORKFORCE DEVELOPMENT BOARD
OF SOLANO COUNTY

Current Committee Members

Standing Committees

Executive – meets bi-annually

Chris Churchill (Chair)	Mario Giuliani (Treasurer)
Shannon Dodds (Vice-Chair)	Mary Dugbartey (Member-At-Large)
Chris Huxsoll (Secretary)	Megan Richards (non-Board Member)

Planning & Oversight - meets 4th Tuesday (non- Board months), 3:00 – 5:00 p.m.

Chris Huxsoll (Chair)	Shannon Dodds
Fadi Halabi (Ex-Officio)	Suzanne Castano
Gerald Huber	David Tam
Dr. Rhuenette Alums (non-Board Member)	

Budget - meets quarterly, 8:30 – 10:00 a.m.

Mario Giuliani (Chair)	Shannon Dodds
Tim Healer	Thomas Stuebner
Megan Richards (non-Board Member)	

Ad-Hoc Committees

Human Resources – meets as needed

Shannon Dodds (Chair)	Danny Bernardini
Gerald Huber	Idowu Koyejo
David Tam	

Working Waterfront Coalition Committee – meets as needed

Sal Vaca (Chair)	Chris Churchill
Kelli Courson	Deanna Hurn
Idowu Koyejo	Glenn Loveall
Thomas Stuebner	Bobby Winston

Equity Committee – meets as needed

Chris Churchill	Coco House
Deanna Hurn	Glenn Loveall
David Tam	

Marketing Committee – meets as needed

Chris Churchill (Chair)	Idowu Koyejo
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BOARD OF DIRECTORS

OFFICERS

Chris Churchill, Chair
President,
Advance Marketing
Business Representative

Shannon Dodds, Vice Chair
VP of Operations,
Paradise Valley Estates
Business Representative

Chris Huxsoll, Secretary
Senior VP of Operations,
Polaris Pharmaceuticals, Inc.
Business Representative

Mario Giuliani, Treasurer
City Manager,
City of Benicia
Economic Development Representative

MEMBER-AT-LARGE

Glenn Loveall
Executive Director,
Napa-Solano Central Labor Council
Labor Representative

Danny Bernardini
Business Manager,
Napa Solano Building &
Construction Trades Council
Labor Representative

Suzanne Castano
Team Manager,
CA State Department of Rehabilitation
Vocational Rehabilitation Representative

Kelli Courson
Owner,
Express Employment Professionals
Business Representative

Mark DeWeerd
Consultant, Center for Organizing & Bargaining,
California Teachers Association
Labor Representative

Mary Dugbartey
Director, Talent & Organizational Development,
NorthBay Healthcare Foundation
Business Representative

Janice Fera
Consortium Manager,
Solano Adult Education Consortium
Education Representative

Fadi Halabi
President,
Duracite
Business Representative

Tim Healer
Vice President
Senior Relations Manager
Rabo AgriFinance
Business Representative

Coco House
Director,
Solano County Farm Bureau
Business Representative

Gerald Huber
Director,
Solano County Health & Social Services
Welfare-to-Work/Food Stamps/
Community Development Representative

Deanna Hurn
Founder/CEO,
Miracle Math Coaching
Business Representative

Idowu Koyejo
Owner,
Teme Salon LLC
Business Representative

Sabrina Martin
Apprenticeship Coordinator,
Operating Engineers Local 3
Apprenticeship Program Representative

Summer Miguel
Human Resources Manager,
Six Flags Discovery Kingdom
Business Representative

Margie Poulos
VP of Global Human Resources,
Jelly Belly Candy Company
Business Representative

Stephen Reese
Chief Executive Officer,
Million Services, Inc.
Business Representative

Thomas Stuebner
Chief Executive Officer,
California Human Development
Community Workforce Representative

David Tam
Cluster Manager – EPM III,
Employment Development Department
Wagner-Peyser Representative

