



Meeting Agenda
Wednesday, September 25, 2024
1250 Main Street
El Centro, CA 92243
12:00 P.M.

CONFLICT OF INTEREST ADVISEMENT

WDB members please be advised: *If an item on the meeting agenda relates to the provision of services by you, your immediate family, the entity you represent, or any person who has made \$250 in campaign contributions to you during the last 12 months, or if approval or disapproval of an agenda item would have a foreseeable material affect on an economic interest of you, your immediate family, or the entity you represent, then please follow these procedures: When the agenda item is first introduced, please immediately announce that you are recusing yourself from participating in the agenda item, and then refrain from discussing, voting on, or otherwise influencing the WDB's consideration of the agenda item. Supporting documentation is available for public review at the Imperial County Workforce Development Board Office.*

1. **Call to Order**
 - a. Pledge of Allegiance
 - b. Conflict of Interest forms
2. **Discussion of Agenda**
 - a. Items to be pulled from Agenda.
 - b. Approval of Meeting Agenda
3. **Approval of Minutes for June 4, 2024**.....pg. 3-5

ACTION AGENDA

4. Discussion/Action to conduct elections of officers for Program Year (PY)2024-2025.....pg. 6
5. Discussion/Action regarding revisions to Data Change Request Form Procedure.....pg. 7-13
6. Discussion/Action regarding revisions to Adult, Dislocated Worker and Youth Follow-up Services Policy.....pg. 14-18
7. Discussion/Action regarding California Workforce Association 2024-2025 annual dues....pg. 19-20
8. Discussion/Action regarding National Association of Workforce Development Board 2024-2025 annual dues.....pg. 21-22

INFORMATIONAL AGENDA

PUBLIC COMMENTS: *This is an opportunity for members of the public to address the Board on any subject matter within the Board's jurisdiction, but not an item on the agenda. Each speaker should complete and submit a "Public Comment Request to Speak" form to the ICWDB Chair. When addressing the Board, state*

your name for the record prior to providing your comments. Individuals will be given three (3) minutes to address the committee.

9. **Committee Members' Reports:**

- a. Board of Supervisors
- b. ICWDB Chair Report
- c. Director's Report
- d. Business Services Unit Report - PY23-24 Annual Reportpg. 23-26
- e. Budget and Finance Committee
 - i. August 2024 Financial Statementpg. 27
- f. Business and Planning Committee
- g. One Stop Policy Oversight Committee
- h. Youth Committee

10. **Meeting adjournment**



Next ICWD Board Meeting
Wednesday, October 23, 2024, at 12:00 p.m. (Tentative)



MINUTES
SPECIAL MEETING OF THE
WORKFORCE DEVELOPMENT BOARD MEETING
June 4, 2024
12:00 P.M.

MEMBERS PRESENT: Elvira Anaya, Ruth Duarte, Erik Freeman, Mark Gran, Jason Jackson, Timothy Kelley, Edwin Oberfell, Robert Rubio, and Efrain Silva

ABSENT: Nicolas Jimenez, Daniel Machain, Darrell Pechtl, Cesar Rodriguez, and Annie Taamilo

GUEST: Adrian Gonzalez, Vivian Perez, Serafin Fregoso, Dania Luna, Elizabeth Espinoza, Gabriel Aguirre, and Michael Kelley

STAFF: Lilliana Sandoval, Jeffery Burquist, Veronica Curiel, Sabrina Rubin, Priscilla Lopez, Allison Duran, Francisca German, Camilo Garcia, Angelica Pacheco, Roman Hernandez, Carlos Lopez, and Martin Robledo

AGENDA ITEMS

1. **Call to order:** ICWDB Board Chair Erik Freeman called the meeting to order at 12:05 p.m. with a quorum present.
 - a. Conflict of Interest Forms: Mr. Oberfell on item # 4.
2. **Discussion of Agenda:**
 - a. Items to be pulled from Agenda: None
 - b. Approval of Meeting Agenda: **MOTION** by Mr. Rubio, Second by Mr. Gran, to approve the meeting agenda. Motion carried.
3. **Approval of Minutes for April 10, 2024: MOTION** by Ms. Anaya, Second by Mr. Rubio, to approve minutes for April 10, 2024. Opposed: None. Abstained: None. Motion carried.

ACTION AGENDA

Mr. Oberfell left the meeting

4. **Discussion/Action to approve WIOA Youth Program Services Contract Awards for Program Year 2024-2025:**

Director Lopez provided an overview of the Request for Proposal process that ICWDB staff followed and the scoring results. Ms. Lopez shared that with both proposed budgets exceeding the \$3,600,000 funding that was available for WIOA Youth Services

in PY24-25. Therefore, with both proposals scoring nearly identical a recommendation was being made to fund both programs in the following amounts:

- IVROP: **\$2,207,457**
- Equus: **\$1,392,543**
(Total: **\$3,600,000**)

MOTION by Mr. Gran, Second by Ms. Duarte, to approve contract awards to IVROP and Equus in the amounts recommended for the provision of WIOA Youth Program Services for Program Year 2024-2025. Opposed: None. Abstained: Edwin Obergfell. Motion carried.

Mr. Obergfell returned to the meeting

5. **Discussion/Action regarding approval of renewing Professional Workforce Development Consulting Services, David Shinder in the amount not to exceed \$40,000:**

Director Lopez provided an overview and recommended approval of renewing Professional Workforce Development Consulting Services, David Shinder in the amount not to exceed \$40,000.

MOTION by Ms. Duarte, Seconded by Mr. Jackson, to approve the renewal of Professional Workforce Development Consulting Services, David Shinder in the amount not to exceed \$40,000. Opposed: None. Abstained: None. Motion carried.

6. **Discussion/Action regarding approval of revised Adult Work Experience Policy:**

Director Lopez provided an overview and recommended approval of the revised Adult Work Experience Policy.

MOTION by Mr. Jackson, Seconded by Ms. Anaya, to approve the revised Adult Work Experience Policy. Opposed: None. Abstained: None. Motion carried.

INFORMATIONAL AGENDA

PUBLIC COMMENTS:

Mr. Kelley provided an overview and invited attendees to attend the Imperial Valley Economic & Energy Summit that will be held on June 12-14, 2024, at Imperial Valley College.

Mr. Gran reported with the completion of the BET renewal, they will join in the Lithium Project community involvement and efforts.

Mr. Jackson shared his experience when attending the National Association of Workforce Development Professionals' 40th Annual Conference on May 20-22, 2024.

7. **Committee Members' Reports:**

- a. Board of Supervisors: Board of Supervisor Michael Kelley provided an update on the Lithium Extraction Project and reported that fellow Board of Supervisors Ryan Kelley and Jesus Escobar are currently in China promoting Imperial Valley/Lithium Project.

- b. ICWDB Chair Report: Mr. Freeman reported the Workforce Development Board meetings will be changed from monthly to bi-monthly; Executive Committee Meetings will continue to be held monthly, start date to follow. Announced the start of a ADHOC meeting with the full purpose to assist The Disabled Community in Imperial Valley.
- c. Director's Report: Director Lopez announced Veronica Curiel and Roman Hernandez promotions within the ICWED Department, welcomed back Sabrina Rubin, continued to mention the Community Outreach will be held on Friday, June 7, 2024, at 10:00 a.m. at Social Services conference room, a WORKCON update was provided, and reported on the approved \$5 million grant for the SBDC program to provide additional services.
- d. Business Services Unit Report: Mr. Lopez announced the Cambria Hotel job fair will be held at Business Development Center, on June 5, 2024, at 9:00 a.m. to 6:00 p.m., distributing applications for the new hotel, they anticipate opening July 5, 2024, reported that on May 30, 2024 CBP held their Resume Workshop at the Business Development Center, with CBP recruitment team, they were able to assist applicants with creating their profiles and complete applications, and the Business unit was able to collaborate with CET to promote services and programs.
- e. Budget and Finance Committee: Ms. Duran provided an overview of the 2024 April financial statement.
- f. Business and Planning Committee: The next meeting is scheduled for July 11, 2024.
- g. One Stop Policy Oversight Committee: The next meeting is scheduled for July 10, 2024.
- h. Youth Committee: The next meeting is scheduled for July 18, 2024.

8. ADJOURNMENT:

The meeting was adjourned at 12:35 p.m. The next regularly scheduled meeting date is June 26, 2024.

**Imperial County Workforce Development Board
Action Agenda Item 4**

MEETING DATE: September 25, 2024

ITEM: 4

SUBJECT: Discussion/Action to approve election of ICWDB Officers for
PY 2024-2025

FROM: Priscilla Lopez, ICWED Director

RECOMMENDATION:

Conduct and approve ICWDB Office Elections for PY 2024-2025 pursuant to ICWDB BYLAWS Section 8.4 *Election of Officers*.

BACKGROUND:

ICWDB BYLAWS Article VIII Officers, Section 8.4 states, "At the last ICWDB meeting of each Business Year, the slate of nominees shall be presented to the Members. Any Members may present nominees from the floor. The Members shall then vote for one nominee for each office. The members with the highest number votes shall be elected to the applicable office. In the event of a tie vote, the winner shall be determined by lot:

On June 4, 2024, the ICWDB Executive Committee met to develop and approve the nomination slate of officers for Program Year 2024-2025.

Slate of Nominees:

Chair: Erik Freeman

Vice-Chair: Timothy Kelley

Secretary: Elvira Anaya

Treasurer: Robert Rubio

On June 5, 2025, ICWDB staff sent out an Officer Nomination Form to all ICWDB Members requesting additional nominations by Thursday, June 20, 2024, as directed by the Executive Committee. No additional nominations were received.

FISCAL IMPACT:

None

**Imperial County Workforce Development Board
Action Agenda Item 5**

MEETING DATE: September 25, 2024

ITEM: 5

SUBJECT: Discussion/Action to approve the revisions to the Adult and Dislocated Worker - CalJOBS Data Change Request Policy

FROM: Priscilla Lopez, ICWED Director

RECOMMENDATION:

ICWED Director recommends approving the revisions to the CalJOBS Data Change Request Policy

BACKGROUND:

WIOA Title I Adult, Dislocated Worker, Youth, and National Dislocated Worker Grant subrecipients staff are required to report participant information via the CalJOBS system. Managers, staff, and Management Information System (MIS) Administrators have the ability to change active participant data. After 30 calendar days, the CalJOBS system does not allow certain areas of the participant record to be changed or updated by managers, staff, or MIS Administrators. The DCR form is a tool to enable the participant data to be changed or updated. Its purpose is to correct data key entry errors and other circumstances that are beyond the control of staff.

Certain elements of the policy have been revised to provide clearer guidance to staff and subrecipients on the process for submitting a CalJOBS Data Change Request. Additionally, recent updates to the required forms have been incorporated into this policy.

FISCAL IMPACT:

None

POLICY	ORIGINAL DATE	LAST REVISION
CalJOBS Data Change Request	FISCAL YEAR 2020-2021	Pending

POLICY OVERVIEW:

This policy provides guidance and establishes procedures to be used by the Imperial County Workforce Development Board (ICWDB), the Imperial County Workforce and Economic Development Office (ICWED), America’s Job Center of California (AJCC) staff and Workforce Innovation and Opportunity Act (WIOA) funded service providers that input data into CalJOBS regarding the Data Change Request (DCR) form.

REFERENCES:

- WIOA (Public Law 113-128)
- Department of Labor (DOL) Training and Employment Guidance Letter (TEGL) 10-16, Change 1 Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III, and Title IV Core Programs (August 23, 2017)

BACKGROUND:

WIOA Title I Adult, Dislocated Worker, Youth, and National Dislocated Worker Grant sub-recipients, and Employment Development Department (EDD) Workforce Services Branch (WSB) staff are required to report participant information via the CalJOBS system. Managers, staff, and Management Information System (MIS) Administrators have the ability to change active participant data. After 30 calendar days, the CalJOBS system does not allow certain areas of the participant record to be changed or updated by managers, staff, or MIS Administrators. The Data Change Request (DCR) form is a tool to enable the participant data to be changed or updated. Its purpose is to correct data key entry errors and other circumstances that are beyond the control of staff.

POLICY AND PROCEDURES:

The DCR form is intended to maintain data integrity, promote consistent and accurate data in the DOL Quarterly and Annual reports, and enable performance to be properly calculated.

Data within the program application cannot be updated or changed once the individual becomes a participant in the program. It is the staff’s responsibility to ensure that all application data is accurate prior to enrolling an individual. The only time a program application can be updated is when additional program eligibility is being determined. Only new data associated to that program eligibility can be added to the application.

Sub-recipients and AJCC staff must ensure records are updated within 30 calendar days of the activity’s Projected End Date/Scheduled Date to avoid a “System Closed” completion status. Once the activity becomes “System Closed,” the data cannot be changed or updated. Activities with a “System Closed” completion status are included in performance calculations.

~~Sub-recipients and TAA staff have access to change data within 30 days of the activity's Actual End Date. Wagner-Peyser staff have access to change data within 30 days of the Actual Service Date.~~

A participant's application is system-exited after 90 calendar days of inactivity across all programs within CalJOBS, and when no new activity has been scheduled for the participant in CalJOBS. If services (except post-program/follow-up services) need to be provided to an applicant who has been system-exited, the application intake process must be completed again. Participants who repeat the application intake process will have their new enrollment counted separately in performance calculations.

If any data needs to be added or changed after 30 days, the DCR form (Attachment I) must be completed and submitted to the **MIS Administrator**. ~~Central Office Workforce Services Division (COWSD), Program Reporting and Analysis Unit (PRAU) via email at WSBManagePerformance@edd.ca.gov.~~ All correspondence should include "Data Change Request" in the subject line. Any requests associated to data beyond 90 days will be reviewed on a case-by-case basis and may not be approved.

Upon receipt of a fully completed DCR form, the **MIS Administrator PRAU** will review the request and analyze the overall impact of the proposed change, especially with respect to current WIOA performance outcomes. Each request will be considered on a case-by-case basis, contingent upon the detailed reasons listed, and the supporting documentation provided. If additional information is required, the **MIS Administrator PRAU** will email the requestor for clarification. The requestor must reply to the **MIS Administrator PRAU** message within ~~three~~ **seven** calendar days, or the request may be denied. The reply must include the entire email stream and all attachments.

~~Accurate data is critical to reporting and performance calculations. While PRAU understands that there are instances that a DCR is necessary, technical assistance may be provided to sub-recipients and WSB staff with excessive DCRs.~~

If the DCR is approved, the **MIS Administrator PRAU will ask the State** to make the requested changes and respond to the requestor. It is the requestor's responsibility to verify that the changes made by the State **PRAU** are accurate. If the DCR is denied, the **MIS Administrator PRAU** will notify the requestor and explain the reason(s) for the denial.

A blank ~~downloadable~~-DCR form **and DCR Supplemental Spreadsheet for WIOA sub-recipients** can be found in Attachment I and II. ~~A blank, downloadable DCR form for Wagner-Peyser and TAA staff can be found in Attachment 2.~~ The DCR Supplemental Spreadsheet should be submitted in its original Excel format (not in a PDF or any other format) and must always be accompanied by the signed DCR.

Completing the Data Change Request Form

Section I – Requestor's Identifying Information

The form's top section requests general information items. ~~This information is required even if the MIS Administrator and requestor are the same individual.~~

Title I Sub-recipient Form:

- Date of Request:
- Sub-recipient: **IMP**

- MIS Administrator: **Veronica Curiel Agundez (veronicacuriel@co.imperial.ca.us) or Camilo Garcia (camilogarcia@co.imperial.ca.us)**
- Requestor Name:
- Requestor's Email Address:
- Requestor's Phone Number:

Wagner-Peyser/TAA Form:

- ~~Date of Request~~
- ~~Division/Field Office~~
- ~~Supervisor, Single Point of Contact (SPOC) or Manager~~
- ~~Requestor~~
- ~~Requestor's Email Address~~
- ~~Requestor's Phone Number~~

Section II – Detailed Reason for Requested Correction

The form's middle section solicits the details necessary to complete the request:

- Reason for the request, as selected from the "Choose an Item" drop-down window
- Applicant's name
- Program name
- Application number or any other form of identifying number
- Specifics on the requested correction
- References to any corresponding documentation
- Policies and procedures put in place to prevent future errors

Please note that a participant's full Social Security number should **never** be included.

Any request without a detailed reason or explanation as to why the change needs to occur will be denied. All applicable documentation must accompany the request.

~~A single DCR form accommodates up to three participants, or three different data changes. Requests for more than three data changes must be listed on the DCR Supplemental Spreadsheet. The spreadsheet must include, at minimum, the program name, application number or State ID, participant's first and last names, and an explanation of what needs to be corrected. The DCR Supplemental Spreadsheet should be submitted in its original Excel format (not in pdf or any other format) and must always be accompanied by the signed DCR.~~

~~A blank, downloadable DCR Supplemental Spreadsheet can be found in Attachment 3.~~

Section III – Authorized Signatures Section

Sub-recipients and AJCC staff must sign and date under the "Authorized Signature of Requestor." The Authorized Signature of MIS Administrator and Executive Director will be captured by the MIS Administrator.

~~For sub-recipients, the signatures of the requestor, MIS Administrator, and Executive Director are required. For Wagner-Peyser and TAA, the signatures of the requestor, requestor's manager, and Deputy Division Chief are required. This enables the Executive Directors and Deputy Division Chiefs to be aware of the nature and number of data changes that are requested. Any request lacking the three required authorized signatures will be denied.~~

ACTION:

Please bring this procedure to the attention of WDB, AJCC system staff and appropriate WIOA funded service providers and sub-recipients. This policy is effective immediately. All submitted forms are live documents and subject to change according to local, State, and Federal needs. Once the forms and exhibits pertaining to this policy are approved by the ICWDB, they will not require board approval if other changes occur, unless the change affects protocols. Should you have any questions, please feel free to contact ICWDB staff at (442) 265-7584, (442) 265-4974, (442) 265-4955 or the Program and Compliance Manager (442) 265-4963.

To: Program Reporting and Analysis Unit
E-Mail: WSBManagePerformance@edd.ca.gov

DATA CHANGE REQUEST: WORKFORCE INNOVATION AND OPPORTUNITY ACT

I. Requestor Identifying Information Section

DATE OF REQUEST: _____
SUBRECIPIENT: **IMP** _____
MIS ADMINISTRATOR: _____
REQUESTOR: _____
REQUESTOR'S EMAIL ADDRESS: _____
REQUESTOR'S PHONE NUMBER: _____

II. Detailed Reason for Requested Correction Section

Make the appropriate selection from the **(CHOOSE AN ITEM)** drop-down menu of what needs to be corrected. Include the applicant's name, program name, application number, and policy and procedure that staff will follow to avoid similar errors from reoccurring. Provide additional documentation as an attachment if needed. If submitting a DCR for more than three individuals or changes, additional participants or changes must be listed separately on an Excel spreadsheet. **Do not send complete Social Security numbers.**

CHOOSE AN ITEM

CHOOSE AN ITEM

CHOOSE AN ITEM

III. Authorized Signature Section

AUTHORIZED SIGNATURE OF REQUESTOR	DATE:
AUTHORIZED SIGNATURE OF MIS ADMINISTRATOR	DATE:
AUTHORIZED SIGNATURE OF EXECUTIVE DIRECTOR (OR PROGRAM DESIGNEE)	DATE:

Accompanying Spreadsheet for the DCR Form

Attachment II

Application #	Program Name	State ID	Last Name	First Name	Grant Code (if applic.)	Activity Code	Incorrect Actual Begin Date	Correct Actual Begin Date	Incorrect Actual End Date	Correct Actual End Date	Service Provided Virtual/Online	ITA Issued: Yes or No (if applic.)	Completion Status	School Status on Last Day of Service (if applic.)	School Status Verification (if applic.)	Comments / Instructions
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**Imperial County Workforce Development Board
Action Agenda Item 6**

MEETING DATE: September 25, 2024

ITEM: 6

SUBJECT: Discussion/Action to approve the revisions to the Adult and Dislocated Worker - Adult, Dislocated Worker and Youth Follow-Up Services Policy

FROM: Priscilla Lopez, ICWED Director

RECOMMENDATION:

ICWED Director recommends approving the revisions to the Adult, Dislocated Worker and Youth Follow-Up Services Policy.

BACKGROUND:

Follow-up services are services provided to WIOA Adult and Dislocated Worker program participants who are placed in unsubsidized employment and have system exited. These services are designed to help individuals retain employment, earn wage gains or advance within their occupation. Youth follow-up services are critical services that are provided following a participant's exit from the program to help ensure the youth is successful in employment and/or postsecondary education and training.

Some aspects of the policy have been updated to offer clearer instructions for staff and subrecipients on entering follow-up data into the CalJOBS system. This includes changes to follow-up due dates and the removal of outdated references.

FISCAL IMPACT:

None

POLICY	ORIGINAL DATE	LAST REVISION
Adult, Dislocated Worker and Youth Follow-Up Services	FISCAL YEAR 2019-2020	Pending

POLICY OVERVIEW:

The purpose of this policy is to provide guidelines and criteria to be used by the Imperial County Workforce Development Board (ICWDB), Imperial County Workforce and Economic Development Office (ICWED), America’s Job Center of California (AJCC) staff, and Workforce Innovation and Opportunity Act (WIOA) funded service providers in the administration of follow- up services for WIOA eligible adult, dislocated workers and youth participants residing in Imperial County.

REFERENCES:

- Training and Employment Guidance Letter (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), as amended by title III of WIOA, and for implementation of the WIOA Final Rules.” (March 1, 2017)
- WIOA Sections 129 (c)(2)(I) and 134 (c)(2)(A)(xiii)
- Workforce Services Directive WSD17-07 “WIOA Youth Program Requirements” (January 16, 2018)
- Workforce Services Directive WSD23-03 “Performance Guidance” (November 8, 2023)

BACKGROUND:

Follow-up services are services provided to WIOA Adult and Dislocated Worker program participants who are placed in unsubsidized employment and have system exited. These services are designed to help individuals retain employment, earn wage gains or advance within their occupation. Youth follow-up services are critical services that are provided following a participant’s exit from the program to help ensure the youth is successful in employment and/or postsecondary education and training.

POLICY AND PROCEDURES:

Follow-up services must be based on each participant’s needs. Participants shall be informed that follow-up is part of the commitment they make when enrolling in the WIOA program and staff must explain the benefit of follow-up services to participants.

Follow-up contacts must be meaningful and person-centered. Staff are encouraged to use open-ended questions in order to identify the participant’s needs. In-person contacts, telephone calls, text messages and e-mails are all appropriate means when providing follow-up services.

Follow up services should:

1. Be integrated into the program design and be seen as having as much value as other program components;
2. Assist participant in overcoming barriers that may interfere with the achievement of their career objectives;

3. Provide proactive and reactive interventions to encourage retention in education or employment;
4. Provide intense and on-going job retention support for both the participant and the employer;
5. Facilitate communication and problem resolution;
6. Provide immediate intervention for both participant and employer as needs are identified;
7. Link the participant to partners to support advancement to better jobs or postsecondary education and training.
8. Help troubleshoot employment and personal issues; and
9. Occur frequently enough to address any issues the participant is currently facing.

Follow-up services begin immediately following the last date of services (closure date). Follow-up services do not trigger the exit date to change, or delay exit for performance reporting.

Adult and Dislocated Workers Programs

WIOA requires that follow-up services must be made available to Adult and Dislocated Workers for up to a period of 12 months following placement into **unsubsidized employment**. The goal of follow-up services is to ensure job retention, wage gains and career progress for participants who have entered unsubsidized employment. Follow-up services may include, but are not limited to the following:

- Counseling individuals about the workplace;
- Contacting individuals and employers to verify employment;
- Contacting individuals and employers to help secure better paying jobs, additional career planning, and counseling to the individual;
- Assisting individuals and employers in resolving work-related problems;
- Connecting Individuals to peer support groups;
- Providing individuals with information about additional educational or employment opportunities; and
- Providing individuals with referrals to other community resources.

Supportive Services are **NOT** allowed in follow-up for Adult and Dislocated Workers.

Youth Programs

WIOA funded Youth Service Providers must ensure that follow-up services be made available to **all** WIOA Youth for a minimum of 12 months from the date of exit. The goal of follow-up services for youth is to enable participants to continue life-long learning and achieve a level of self-sufficiency to ensure job retention, wage gains, and postsecondary education and training progress.

Follow-up services for youth may include, but are not limited to the following program elements:

- Supportive services;
- Adult mentoring;
- Financial literacy education;
- Services that provide labor market information and employment information about in demand industry sectors;
- Activities that help youth prepare for and transition to postsecondary education and training; and
- Other services necessary to ensure the success of the youth in employment and/or postsecondary education.

All youth must receive some form of follow-up services for a minimum duration of 12 months, unless the youth declines to receive follow-up services or the youth cannot be located or contacted. **This notification must be clearly documented in case notes.** The types of services provided, and the intensity of services must be determined based on the needs of the youth. Follow-up services can be provided and recorded at any time during the follow-up quarter. ~~*Follow-up services must include more than a*~~

~~contact or attempted contact. Follow-up services must include more than only a contact attempted or made for securing documentation in order to report a performance outcome. An interaction and the provision of unacceptable follow-up services must be provided.~~ The WIOA Youth Service Provider is responsible for showing due diligence that efforts were made to maintain communication and/or re-engage participants who are not responsive to the case manager’s follow-up efforts.

Frequency of Follow-up Services for Adult, Dislocated Workers and Youth

Follow-up contacts with Adult, Dislocated and Youth participants will occur quarterly. In the event staff are unable to locate a participant, at least three (3) different attempts to contact participants must be made within the thirty (30) day period. **These attempts must be documented and made on different days.**

Example for participant exiting between January 1st and March 31st:

Exit Date	Follow-up Timeline			
	1 st Quarter Apr – Jun	2 nd Quarter Jul - Sep	3 rd Quarter Oct – Dec	4 th Quarter Jan - Mar
Jan 1 – Mar 31	Follow-up due July 1 st –30 th Follow-up due By June 30th	Follow-up due October 1 st –30 th Follow-up due By September 30th	Follow-up due January 1 st –30 th Follow-up due December 31st	Follow-up due April 1 st –30 th Follow-up due By March 31st

The intensity of appropriate follow-up services will vary among participants. Participants who have multiple barriers and limited work histories may be in need of significant follow-up services to ensure long-term success in the labor market. Follow-up may be conducted by telephone, in person, via e-mail, social media, texting, or by other written correspondence. It is the staff’s responsibility to engage participants through a medium that increases the probability of interaction with the participant, as well as increases the probability of continued contact.

It is the AJCC/Service Provider’s responsibility to monitor the participant’s final exit date to identify when to begin post exit follow-up.

DOCUMENTATION:

Staff must ensure that appropriate documentation is maintained for the follow-up service provided to individual participants. Appropriate documentation is needed to justify the types, frequency and duration of follow-up services provided to individual participants. All documentation must include dates and corresponding information and must be entered in the CalJOBS system within thirty (30) calendar days of the follow-up date.

~~For additional guidance regarding the follow-up process and managing case notes, please refer to ICWED BULLETEN NO. 15-9 and ICWED BULLETIN NO. 15-11.~~

Follow-up services may be discontinued if the participant indicates that they no longer need or want the follow-up contact. The participant must send a documentation in writing (i.e. letter, e-mail, text message) indicating their desire not to be contacted further. This must be documented in the CalJOBS case notes. In the event that the participant does not send written documentation within 90 days, the CalJOBS case note will suffice.

MONITORING:

It is the responsibility of ICWED, AJCC staff, and youth providers to monitor follow-up services to ensure compliance with WIOA requirements. ICWED is responsible for ensuring oversight of the WIOA

funded programs. Monitoring shall take place by means of on-site visits to AJCCs and contracted Service Providers. Site visits shall be performed at a minimum of once a year. An annual monitoring visit schedule and monitoring review tool will be used to ensure adherence to WIOA laws, regulations and policies to ensure that clients are provided appropriate access to programs or activities.

ACTION:

Please bring this policy to the attention of ICWDB, AJCC system staff and appropriate WIOA funded service providers and sub-recipients. This policy is effective immediately. All submitted forms are live documents and subject to change according to local, State, and Federal needs. Once the forms and exhibits pertaining to this policy are approved by the ICWDB, they will not require board approval if other changes occur, unless the change affects protocols. Should you have any questions, please feel free to contact ICWDB staff at (442) 265-4974, (442) 265-7584, (442) 265- 4955 or the Program and Compliance Manager at (442) 265-4963.

**Imperial County Workforce Development Board
Action Agenda Item 7**

MEETING DATE: September 25, 2024

ITEM: 7

SUBJECT: Discussion/Action to approve California Workforce Association 2024-2025 annual dues

FROM: Priscilla Lopez, ICWED Director

RECOMMENDATION:

ICWED Director recommends to approve payment of \$14,260 in annual membership dues to the California Workforce Association (CWA) for PY2024-2025.

BACKGROUND:

CWA is a non-profit member association that provides leadership on local, statewide, and national workforce issues. CWA represents all 48 Workforce Development Boards in the State of California, as well as over 70 other members. The association develops public policy strategies and builds local capacity to address critical workforce issues.

The dues that are paid to CWA contribute to the following membership benefits:

- *A seat on CWA Board of Directors.*
- *Access to Quarterly Board Meetings and Monthly Workforce Calls.*
- *Access to critical and exclusive information via CWA email list.*
- *Participation on Association Committees: Executive, Legislative, Opportunities (State WIOA technical), Race and Equity and Capacity Building.*
- *Discounts on CWA Yearly Conferences.*
- *Support and work on State/Local level workgroups including compliance monitoring, MIS, RESEA/RR and others.*
- *Partnership development with LWDA and other State Agencies and Departments.*
- *Access to the California Training Initiative.*
- *Member discounts to all our trainings and conferences.*
- *All State and Federal legislative activities include bill sponsorship, capitol visits, working through NAWB, Conference of Mayors, NSC, and USWA.*
- *Access to Day at the Capitol and our lobbying events in Sacramento and DC.*
- *Promotion of the work that local boards do through a public relation campaign.*
- *Support the position of a newly created Membership Coordinator.*
- *Individualized TA and Peer-to-Peer technical assistance*

There is no price increase compared to last year's dues. The cost for PY23-24 totaled \$14,260.

FISCAL IMPACT:

\$14,260



Invoice

Date	Invoice #
6/11/2024	10854

Bill To
Imperial County Workforce Development Boa Priscilla Lopez 2799 South 4th Street El Centro, CA 92243

Description	Amount
CWA Annual Dues Fiscal Year 2024-25	14,260.00
Thank you for your support!	
A 3.5% service fee will be charged if paying with a credit card.	
Total	\$14,260.00

Make all checks payable to:
California Workforce Association
925 Del Paso Blvd.
Sacramento, CA 95815

Balance Due	\$14,260.00
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**Imperial County Workforce Development Board
Action Agenda Item 8**

MEETING DATE: September 25, 2024

ITEM: 8

SUBJECT: Discussion/Action to approve National Association of Workforce Development Board 2024-2025 annual dues

FROM: Priscilla Lopez, ICWED Director

RECOMMENDATION:

ICWED Director recommends to approve payment of \$2,300 in annual membership dues to the National Association of Workforce Boards for PY2024-2025.

BACKGROUND:

The National Association of Workforce Boards (NAWB) is the only association that advocates on behalf of workforce development boards (WDBs), representing over 580 WDBs and their 12,000+ business members. NAWB's mission is to support its members through a comprehensive program of advocacy, training and technical assistance, communication, and strategic partnerships to promote the advancement of our nation's workforce. NAWB membership grants exclusive access to world-class leadership development opportunities, regular policy updates from Washington, professional development opportunities, peer-to-peer networking, technical assistance, advocacy, and more.

There is no price increase compared to last year's dues. The cost for PY23-24 totaled \$2,300.

FISCAL IMPACT:

\$2,300

National Association of Workforce Boards

1155 15th St NW Ste 725
Washington, DC 20005
+1 2028577900
nawb@nawb.org
www.nawb.org



INVOICE

BILL TO
Priscilla Lopez
Imperial County Workforce Development Office
2799 South 4th Street
El Centro, California 92243

INVOICE 4031
DATE 06/30/2024
DUE DATE 06/30/2024

DATE	ACTIVITY	AMOUNT
	Membership Full NAWB Membership Renewal Dues Member Category: \$7M - \$10M	2,300.00

We are excited to have you as a member of the National Association of Workforce Boards! With your membership, you are a part of the national conversation and the development of long-term solutions that help American jobseekers and businesses succeed amid the demands of the future economy.

Member benefits include access to professional development opportunities like the Executive Bootcamp and monthly Coffee and Conversation sessions. Your membership also comes with discount registration to Forum, the nation's premier annual gathering of workforce board leadership.

Please visit nawb.org for more information about your member benefits and to register for special events. We look forward to engaging with you soon!

Team NAWB
Invoice updated on 7/1/2024

BALANCE DUE **\$2,300.00**

PY2023 - 2024

ANNUAL REPORT

WIOA Business Services



WIOA Business Services Annual Report

During PY2023-2024, the Imperial County Workforce and Economic Development Business Services Team delivered a wide array of services aimed at supporting local businesses while creating training and employment opportunities for job seekers. The purpose of this report is to quantify and measure the success of Workforce Innovation and Opportunity Act funding in the Imperial County Region.

Business Served and Services Provided

263 businesses received services for PY23-24, ranging from:



On-the-Job Training

WIOA On-the-Job Training assists local businesses by offsetting training costs for new hires, facilitates workforce development, and enhances productivity. Through tailored skill-building, companies gain skilled employees, while job seekers obtain meaningful employment, creating economic growth.

While the direct investment of OJT allowed for \$257,145 to be paid in direct wages through the program, an important indirect benefit of the program is that it helps reduce unemployment. By getting unemployed individuals into jobs, the program either prevents them from

receiving unemployment benefits or shortens the time they need those benefits. According to the U.S. Department of Labor, Employment and Training Administration, the average person receives unemployment benefits for about 20 weeks and the average weekly benefit is about \$385. This amounts to roughly \$7,700 in benefits per person. By placing someone in a job, these costs are avoided and the individual is able to contribute to income tax and Social Security/Medicare.



Industries Utilizing OJTS

- 1. Healthcare
- 2. Professional Services
- 3. Retail
- 4. Food Services
- 5. Agriculture
- 6. Transportation Warehouse
- 7. Community Based Organizations
- 8. Construction/Specialty Trade Contractors

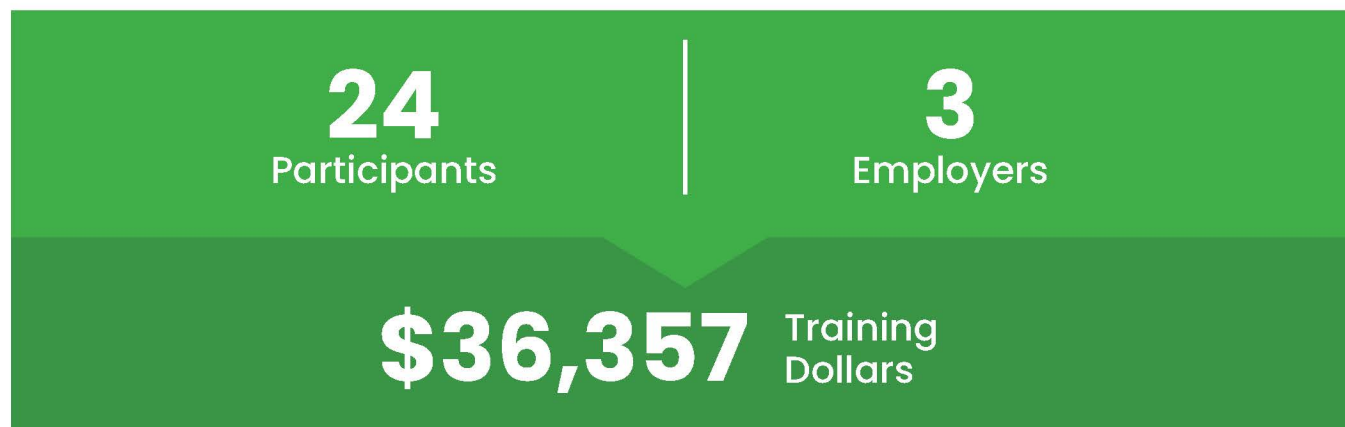
Transitional Jobs

In the PY23-24 program year, a new WIOA program called Transitional Jobs (TJ) was launched. TJ's offer short-term, paid positions for people facing employment barriers. These jobs help individuals gain vital work experience and improve their chances of finding permanent employment. For businesses, TJ's provide a cost-free way to meet immediate staffing needs while also supporting workforce development.



Incumbent Worker Training

Incumbent Worker Training (IWT) helps employers upskill their current workforce, boosting productivity and completeness. By covering most of the training costs, businesses can improve their team's skills leading to better performance, adaptability, and ultimately-growth.

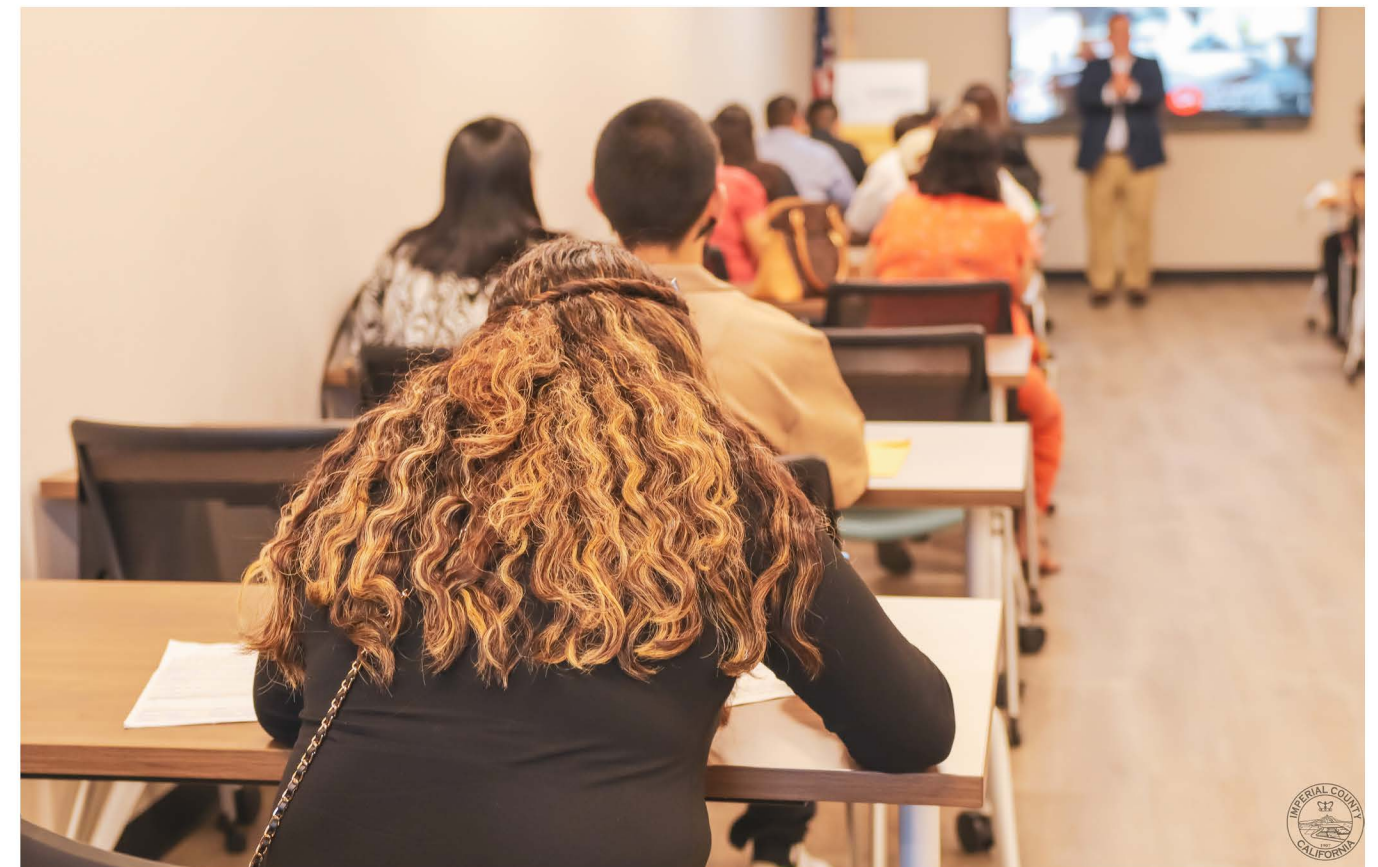


Job Fairs

Another key service offered through the Business Services Team are Job Fairs which connect businesses with qualified candidates, streamlining the hiring process. During PY23-24, ICWED hosted 2 major job fairs for the opening of Cambria Hotel and U.S. Customs and Border Patrol. Job seekers were provided

direct access to potential employers raising their chances of securing employment.

ICWED saw major turnouts for these job fairs. On June 5th, 2024, approximately 1,000 job seekers were in attendance for the Cambria Imperial Hotel hiring event.



Lithium Valley Workforce and Economic Development Needs Assessment

Needs Assessment

1. Identify stakeholders
2. Current state of the Valley
3. Potential state of the Valley
4. Gaps and Challenges
5. Recommendations

In May 2024, the ICWDB entered into an agreement for services to perform a Lithium Valley Workforce and Economic Development Needs Assessment with RAND after a competitive bidding process. The project involves analyzing the potential economic impact of Lithium extraction in the Salton Sea area. On June 7, 2024, the ICWDB and RAND hosted a kick-off meeting

to introduce the project to local stakeholders and the community. 30 organizations across Industry, Government, Education, Economic Development, Workforce Development, Labor, and Community Based Organizations, were in attendance to provide input and feedback at the start of the project.



In PY24-25, RAND will work together with the ICWDB and relevant stakeholders to develop a research-based roadmap. This roadmap will guide the county and its workforce in preparing for the emerging industry and position the county to attract related key sectors. The final report is expected to be completed May 2025 and will be presented in June 2025.

Roadmap **Actionable** **Measurable** **Tailored to stakeholder groups**

**Imperial County Workforce and Economic Development Office
Financial Statement
As of August 31, 2024**

FY 2024-2025 WIOA Allocation		\$	8,316,105			
FY 2022-2025 Lithium Project		\$	679,074			
FY 2023-2024 WIOA Carryover		\$	5,763,681			
Total Budget FY 2024-2025		\$	14,758,860			
		Contract End Dates	Budget 2024-2025	YTD Expenditures	Unexpended	Percentage of Expenditures per Line Item
1	Workforce Development Office Salaries (10 Staff)	30-Jun-25	762,553	109,474	653,079	14%
2	Workforce Development Office Benefits (10 Staff)	30-Jun-25	346,769	49,097	297,672	14%
3	Workforce Development Office Cost	30-Jun-25	583,264	69,467	513,797	12%
4	Workforce Development Board Salaries (3 Staff)	30-Jun-25	339,243	36,297	302,946	11%
5	Workforce Development Board Benefits (3 Staff)	30-Jun-25	161,161	13,515	147,646	8%
6	Workforce Development Board Cost	30-Jun-25	231,812	14,184	217,628	6%
7	One Stop Operational Salaries (16 Staff)	30-Jun-25	1,004,904	116,495	888,409	12%
8	One Stop Operational Benefits (16 Staff)	30-Jun-25	328,954	66,991	261,963	20%
9	One Stop Operational Cost	30-Jun-25	1,447,293	194,998	1,252,295	13%
10	Business Center Salaries (3 Staff)	30-Jun-25	160,825	24,084	136,741	15%
11	Business Center Benefits (3 Staff)	30-Jun-25	142,351	8,190	134,161	6%
12	Business Center Cost	30-Jun-25	397,490	75,957	321,533	19%
13	CWA Membership Dues	30-Jun-25	14,260	-	14,260	0%
14	National Association of Workforce Boards (NAWB)	30-Jun-25	2,300	-	2,300	0%
15	LIGHTCAST-EMSI Analyst Software	30-Jun-25	9,250	-	9,250	0%
16	Placer.ai - Software	30-Jun-25	27,562	-	27,562	0%
17	Career EDGE - Annual License	30-Jun-25	31,500	-	31,500	0%
18	SIERRA HR Hotline	30-Jun-25	10,008	-	10,008	0%
19	WDB Members, Meals, Travel, Conferences	30-Jun-25	55,000	1,302	53,698	2%
20	WDB/WDO Marketing & Other Services	30-Jun-25	60,000	1,152	58,848	2%
21	Propath Inc., - AJCC Operator 25-26	31-Dec-25	75,000	-	75,000	0%
22	Professional Consulting Services - David K Shinder	30-Jun-25	40,000	3,464	36,536	9%
Year Round Youth 2024-2025						
23	IVROP Operational Cost	30-Jun-25	1,075,794	-	1,075,794	0%
24	IVROP Work Experience/Stipends	30-Jun-25	1,119,900	70,779	1,049,121	6%
25	IVROP Supportive Services	30-Jun-25	11,763	890	10,873	8%
26	EQUUS Operational Cost	30-Jun-25	1,002,338	-	1,002,338	0%
27	EQUUS Work Experience	30-Jun-25	386,705	-	386,705	0%
28	EQUUS Supportive Services	30-Jun-25	3,500	-	3,500	0%
Workers Compensation & ADP WIOA Participant Fees						
29	Workers Compensation WIOA Participant Fees	30-Jun-25	100,000	11,278	88,722	11%
30	ADP Participant WIOA Processing Fees	30-Jun-25	30,000	3,125	26,875	10%
31	Adult WIOA Supportive Services	30-Jun-25	170,000	22,102	147,898	13%
201/501 30% Training Expenditure FY 2024-2025						
32	Adult Vocational ITA 24-25	30-Jun-25	853,780	25,591	828,189	3%
33	OJT One Stop Centers 24-25	30-Jun-25	378,000	9,459	368,541	3%
34	Incumbent Worker Training (IWT) 24-25	30-Jun-25	50,000	-	50,000	0%
35	Transitional Jobs	30-Jun-25	443,671	5,236	438,435	1%
Adult Work Experience(WEX) FY2024-2025						
36	WEX-Adult Work Experience 24-25	30-Jun-25	86,120	6,959	79,161	8%
Nursing Mentorship Programs FY 2024-2025						
37	IVROP Registered Nurse Mentorship Program XIII 24-25	30-Jun-25	550,000	-	550,000	0%
38	IVROP Licensed Vocational Nurse Mentorship Program III 24-25	30-Jun-25	338,108	-	338,108	0%
Carry over Obligated Training Expenditure FY 2023-2024						
39	Adult Vocational ITA 23-24	30-Jun-25	240,000	84,174	155,826	35%
40	OJT One Stop Centers 23-24	30-Jun-25	102,855	48,738	54,117	47%
41	Transitional Jobs	30-Jun-25	105,441	41,997	63,444	40%
42	IVROP Registered Nurse Mentorship Program XII 23-24	30-Jun-25	179,568	22,332	157,236	12%
43	IVROP Registered Nurse Mentorship Program XIII 24-25	30-Jun-25	339,116	37,593	301,523	11%
44	IVROP Licensed Vocational Nurse Mentorship Program II 24-25	30-Jun-25	146,713	22,373	124,340	15%
Adult Work Experience(WEX) 2023-2024						
45	WEX-Adult Work Experience 23-24	30-Jun-25	97,915	61,915	36,000	63%
46	Propath Inc., - AJCC Operator 23-24	31-Dec-24	37,000	4,600	32,400	12%
47	Lithium Valley Assessment Project (Rapid Response)	30-Jun-25	679,074	30,000	649,074	4%
Total Funds Allocated			14,758,860	1,293,808	13,465,052	
Funds available to be allocated			-	-	-	
Grand Total			14,758,860	1,293,808	13,465,052	
Percentage of Expenditures						9%