



WORKFORCEALLIANCE
OF THE NORTH BAY
DRIVING WORKFORCE TALENT

**REGIONAL WORKFORCE DEVELOPMENT BOARD
EXECUTIVE COMMITTEE MEETING
AGENDA**

**Wednesday, October 9, 2019
9:00 AM**

Napa County: 1546 First Street, Second Floor, Napa, CA

Mendocino County: 2550 N. State Street, Ukiah, CA

CALL TO ORDER

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| I. | 9:00 | A. Introductions
B. Public Comment |
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CONSENT CALENDAR

These matters typically include routine financial or administrative **action items** requiring a vote.
Any item will be discussed separately at the request of any person. Items are approved with one single motion

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| II. | | A. Approve August 14, 2019 Meeting Minutes. [Attachment II.A]
B. Appointment of a new Chair and Vice Chair for the Napa Advisory Subcommittee and a new Vice Chair for the Marin Advisory Subcommittee
a. Amar Inalsingh – Napa Advisory Subcommittee Chair
b. Myles Davis – Napa Advisory Subcommittee Vice Chair
c. Jason Henderson – Marin Advisory Subcommittee Vice Chair
C. Approve WANB Policies [Attachment II.C]
a. Youth Program Eligibility
b. Youth Program
D. Ratify approval 2019/2020 agreements [Board Letter II.D]
E. Approve PY 18/19 4 th Quarter Program Reports [Attachment II.E] |
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REGULAR CALENDAR

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| III. | | A. Training Proposal – CareerPoint Marin [Attachment III.A] (Action)
B. Approve modified/new additional assistance grant to CWDB (Walk-in) (Action) |
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INFORMATION / DISCUSSION ITEMS

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| IV. | | A. Reserves development strategy
Staff will walk Committee through discussion on creation of a non-WIOA general fund for the WANB. |
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MEMBER / DIRECTOR REPORTS

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| V. | | A. Member
B. Director
a. Regional Conference 2.4.2020
b. Legislation and EMSI reports
c. Lake County Strategic Doing Session |
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ADJOURN

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| VI. | | A. Future Agenda Items
B. Adjourn |
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WORKFORCEALLIANCE
OF THE NORTH BAY
DRIVING WORKFORCE TALENT

**REGIONAL WORKFORCE DEVELOPMENT BOARD
EXECUTIVE COMMITTEE MEETING
MINUTES**

**Wednesday, August 14, 2019
9:00 AM**

Napa County: 1546 First Street, Second Floor, Napa, CA

Mendocino County: 2550 N. State Street, Ukiah, CA

CALL TO ORDER

I.	9:00	<p>A. Chair Jeri Hansen called the meeting to order at 9:10 AM.</p> <p>Members Present: Executive Committee Chair Jeri Hansen; Executive Committee Vice Chair Maureen Mulheren; Napa Advisory Subcommittee Chair Mary Ann Mancuso; Mendocino Advisory Subcommittee Chair Lene Vinding, Marin Advisory Subcommittee Chair Susan Byrne, Policy & Oversight Subcommittee Chair Amar Inalsingh.</p> <p>Members Absent: Lake Advisory Subcommittee Chair Monica Rosenthal</p> <p>Workforce Alliance Staff Present: Executive Director, Bruce Wilson; Workforce Development Analyst, Sylwia Palczewska; Fiscal Officer, Taylor Swain; Business Services Representative, Stacey Caico; Operations Analyst Tamara Ochoa; Operations Officer Laura Davis.</p> <p>Guests: CareerPoint MARIN Program Manager, Sherry Parr; CareerPoint NAPA Program Manager, Teresa Brown.</p> <p>Public Comment: None</p>
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CONSENT CALENDAR

These matters typically include routine financial or administrative **action items** requiring a vote.
Any item will be discussed separately at the request of any person. Items are approved with one single motion

II.		<p>A. Approve May 8, 2019 Meeting Minutes. [Attachment II.A]</p> <p>Motion made to approve May 8, 2019 Meeting Minutes. M/S Mary Ann Mancuso / Suzie Byrne Motion carried: 5-0 Yea: 5 Nay: 0 Abstentions: Maureen Mulheren Absent: Monica Rosenthal</p>
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REGULAR CALENDAR

III.		<p>A. DW to Adult Transfer Request (Action) CareerPoint Napa and CareerPoint Marin have requested to transfer the funds from DW to Adult for PY 19/20. Requested Action: Approve transfer of funds from DW to Adult for PY 19/20 for CareerPoint Napa and CareerPoint Marin.</p> <p>Motion made to approve transfer of funds from DW to Adult for PY 19/20 for CareerPoint Napa.</p>
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	<p>M/S Suzie Byrne / Amar Inalsingh Motion carried: 6-0 Yea: 6 Nay: 0 Abstentions: 0 Absent: Monica Rosenthal</p> <p>Motion made to approve transfer of funds from DW to Adult for PY 19/20 for CareerPoint Marin. M/S Amar Inalsingh / Suzie Byrne Motion carried: 6-0 Yea: 6 Nay: 0 Abstentions: 0 Absent: Monica Rosenthal</p> <p>B. Request to rollover unspent funds (Action) CareerPoint Napa has requested to rollover unspent youth funds and Career Point Lake and CareerPoint Mendocino have requested to rollover unspent all WIOA program funds from PY 18/19 to PY 19/20. Requested Action: Consider request to rollover unspent funds from PY 18/19 to PY 19/20.</p> <p>Fiscal Officer Swain presented State of California requirements for training funds for Adult and Dislocated Worker programs. Executive Committee thoroughly discussed the request and expressed concerns. Sherry Parr said that CareerPoint Marin also has unspent training money that they want to carry-in. Executive Committee decided that each service provider will need to present a specific plan on how they're going to spend training money to their Local Advisory Subcommittee. Executive Committee will consider any recommendation from the Local Advisory Subcommittee. Operations Officer Laura Davis clarified that rolling over unspent youth funds is safe and recommended approving request from CareerPoint Napa.</p> <p>Motion made to approve request to rollover unspent youth funds from PY 18/19 to PY 19/20 CareerPoint Napa. M/S Amar Inalsingh / Suzie Byrne Motion carried: 6-0 Yea: 6 Nay: 0 Abstentions: 0 Absent: Monica Rosenthal</p> <p>Motion made to have all service providers present a specific plan for spending training money to their Local Advisory Subcommittee and seek their approval. M/S Mary Ann Mancuso / Amar Inalsingh Motion carried: 6-0 Yea: 6 Nay: 0 Abstentions: 0 Absent: Monica Rosenthal</p> <p>C. AB1111 (Action) Staff will discuss local CBO's interested in submission of applications for AB1111 funds. Requested Action: Consider and potentially approve partnership agreements with recommended partners.</p>
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Executive Director Wilson reported that several community organizations reached out to Workforce Alliance to partner in applying for Breaking Barriers to Employment Act AB1111 funds – program administered by the California Workforce Development Board. Wilson, Swain, and Davis met with all interested organizations and listened to their program propositions. Wilson recommended that the WANB sign partnership agreements with all CBO's that requested our assistance.

Motion made to approve partnership agreements with recommended organizations.

M/S Mary Ann Mancuso / Amar Inalsingh

Motion carried: 6-0

Yea: 6

Nay: 0

Abstentions: 0

Absent: Monica Rosenthal

D. Proposed new Regional Dashboard Format [Attachment III.D] (Action)

Requested Action: Consider and possibly approve Policy and Oversight Committee recommendations for revised dashboard format.

Operation Analyst Tamara Ochoa explained each section of the new dashboard. Executive Committee appreciated new format and agreed it is easier to read and interpret. Executive Director Wilson thanked the Policy and Oversight Committee members and Operation Analyst Ochoa for their work on a new revamped dashboard format.

Motion made to approve new dashboard format.

M/S Mary Ann Mancuso / Suzie Byrne

Motion carried: 6-0

Yea: 6

Nay: 0

Abstentions: 0

Absent: Monica Rosenthal

E. Approval of Subcommittee Members [Attachment III.E] (Action)

The committee will review and approve new applications for membership to one or more of the WANB Subcommittees:

- Brian Avila, Director of Operations & Member Services, The ROC – Napa Advisory Subcommittee
- Alan Flora, City Manager, City of Clearlake – Lake Advisory Subcommittee

Requested Action: Consider and possibly approve new Subcommittee Members

Motion made to approve new members.

M/S Lene Vinding / Amar Inalsingh

Motion carried: 6-0

Yea: 6

Nay: 0

Abstentions: 0

Absent: Monica Rosenthal

F. Conflict of Interest Code Revisions [Attachment III.F] (Action)

Requested Action: Close public comment period as of August 24th, 2019.

Workforce Alliance Conflict of interest was updated to accommodate following changes:

- Removing Local Advisory Subcommittee Members
- Consolidating the Executive Director and Local Area Administrator positions

		<ul style="list-style-type: none"> • One Stop Operator changed to Career Service Provider • Adding Mendocino Career Service Provider <p>Motion made to close public comment period as of August 24th, 2019. M/S Suzie Byrne / Amar Inalsingh Motion carried: 6-0 Yea: 6 Nay: 0 Abstentions: 0 Absent: Monica Rosenthal</p>
INFORMATION / DISCUSSION ITEMS		
IV.		<p>A. Impact Napa Executive Director Wilson reported that Workforce Alliance was a sponsor for the Impact Napa event held by the North Bay Journal on August 20, 2019 at the Meritage Hotel in Napa. Part of the event was devoted to the wildfire preparedness.</p> <p>B. Business Resource Fair Executive Director Wilson reported on the Business Services Fair that was held on June 25, 2019 at the COPIA Atrium and Vintner's Theater in Napa. 112 people attended the event: 78 were employers and 34 were network partners. Dr. Robert Eyler, president of Economic Forensic and Analytics and Regional Workforce Development Board member was our opening speaker. Wilson thanked Chair Jeri Hansen for leading the program.</p> <p>C. February 4, 2020 Regional Training Conference All Workforce Alliance board members and Service Providers Staff are invited to participate in the Regional Training Conference on February 4, 2020.</p>
MEMBER / DIRECTOR REPORTS		
V.		<p>A. Member - Lene Vinding shared that she and Monica Rosenthal joined Bruce and Taylor as invited guests to the MPIC, Inc board meeting. She said it was a very difficult meeting and that there were fiscal related concerns that WANB and MPIC are in disagreement about. A follow up meeting is intended to occur in Fall 2019.</p> <p>B. Director</p>
ADJOURN		
VI.		<p>A. Future Agenda Items B. Adjourn</p> <p>Chair Hansen adjourned the meeting at 10:42 AM.</p>



YOUTH PROGRAM ELIGIBILITY

PURPOSE

The purpose of this policy is to provide guidance to Workforce Alliance of the North Bay (Alliance) service providers in determining participant eligibility for Workforce Innovation and Opportunity Act (WIOA) youth programs.

SCOPE

Workforce Innovation and Opportunity Act Title I contracted Service Providers

RESPONSIBLE PARTY

Workforce Alliance of the North Bay
Regional Workforce Development Board

REFERENCES

- WIOA (Public Law 113-128) Sections 126 (a) (3) (B,) Section 129 (3) (A) (i) and Section 129 (3) (A) (ii)
- Title 20 CFR "WIOA Final Rule" Sections 681.210 - 681.280, 681.300, 681-310
- Training and Employment Guidance Letter (TEGL) 21-16 "Third Workforce Innovation and Opportunity Act (WIOA) Title I Youth Formula Program Guidance" (March 2, 2017)
- TEGL 8-15 "WIOA Youth Program Transition" (March 26, 2015)
- Workforce Services Directive WSD17-07 "WIOA Youth Program Requirements" (January 16, 2018)

DOCUMENTS

- WANB Youth Eligibility Determination Form 109

DEFINITIONS

Adult Education – academic instruction and education services below the post-secondary level that increases an individual's ability to: read, write, and speak in English and perform mathematics or other activities necessary for the attainment of a secondary school diploma or its recognized equivalent; transition to postsecondary education and training; and obtain employment. (WIOA Section 203)

Alternative school – an alternative school is a type of school designed to achieve grade-level (K-12) standards and meet student needs (EC Section 58500). Examples of alternative schools include, but are not limited to, continuation, magnet, and charter schools. If the youth participant is attending an alternative school at the time of enrollment, the participant is considered to be in-school.

Attending school – an individual is considered to be attending school if the individual is enrolled in secondary or postsecondary school. If a youth is between high school graduation and postsecondary education, the youth is considered an In-School (IS) youth if they are registered for postsecondary education, even if they have not yet begun postsecondary classes. However, if the youth registers for

postsecondary education, but does not follow through with attending classes, the youth is considered an Out-of-School (OS) youth if the eligibility determination is made after the youth decided not to attend postsecondary education. Youth on summer break are considered IS youth if they are enrolled to continue school in the fall (TEGL 21-16).

Not attending school – an individual who is not attending a secondary or postsecondary school. In addition, individuals enrolled in the following programs would be considered an OS youth for eligibility purposes:

- WIOA Title II Adult Education, YouthBuild, JOB Corps, high school equivalency program, or dropout re-engagement programs.
 - A youth attending a high school equivalency program funded by the public K-12 school system who is classified by the school system as still enrolled in school are the exception; the youth would be considered an IS youth (Title 20 CFR Section 681.230).
- Non-credit bearing postsecondary classes only (TEGL 21-16).
- A charter school program that provides instruction exclusively in partnership with WIOA, federally funded YouthBuild programs, federal Job Corps training or instruction, California Conservation Corps, or a state certified local conservation corps (in alignment with EC Section 47612.1).

Offender – An adult or juvenile subject to any stage of the criminal justice process or an adult or juvenile who requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or convictions of for who services under WIOA may be beneficial (WIOA Section 3[38]).

Postsecondary school – California community colleges, and accredited public and private universities (EC Section 66010).

School – any secondary or post-secondary school (Title 20 CFR Section 681.230). These include, but are not limited to, traditional K-12 public schools and private schools (e.g., continuation, magnet, charter, and home).

School dropout – an individual who is no longer attending any school and who has not received a secondary school diploma or its recognized equivalent. (WIOA 3[54]) Per TEGL 8-15, this term does not include individuals who dropped out of post-secondary school.

Secondary school – a nonprofit institutional day or resident school, including a public secondary charter school, that provides secondary education, as determined under state law, except that the term does not included any education beyond grade 12. (Title 20 U.S.C. Section 1401[27]).

Individual with a Disability – An individual with 1) A physical or mental impairment that substantially limits one or more major life activities of such individual; 2) A record of such an impairment; or 3) Being regarded as having such an impairment (Americans with Disabilities Act Section 12012 1,3 and WIOA Section 3[25]).

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

1. An individual who lacks a fixed, regular, and adequate nighttime residence; and
2. Includes an individual who:
 - a. Is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; is living in a motel, hotel, trailer park, or campground due to the lack of alternative adequate accommodations; is living in an emergency or transitional shelter; is abandoned in a hospital; or is awaiting foster care placement;
 - b. 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 who qualify as homeless because the children are living in circumstances defined in Section 1309 of the Elementary and Secondary Education Act of 1965; 20 U.S.C. 6399.

Homeless Child or Youth – as defined in Section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a(2))

1. An individual who lacks a fixed, regular, and adequate nighttime residence; and
2. Includes children and youth who:
 - a. Are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in a motel, hotel, trailer park, or campground due to the lack of alternative adequate accommodations; are living in an emergency or transitional shelter; are abandoned in a hospital; or are awaiting foster care placement;
 - b. Have 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;
 - c. Are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; or
 - d. Migratory children who qualify as homeless because the children are living in circumstances defined in Section 1309 of the Elementary and Secondary Education Act of 1965; 20 U.S.C. 6399.

Foster Youth – an individual in foster care or has aged out of the foster care system, or who has attained 16 years of age and left foster care for kinship guardianship or adoption; a child eligible for assistance under Section 477 of the Social Security Act (42 U.S.C. 677); or an individual who is an out of home placement.

Basic Skills Deficient/Low Levels of Literacy — who is a youth, that the individual who has English reading, writing, or computing skills at or below the 8th grade level on a generally accepted standardized test; or who is a youth or adult, that the individual 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 (WIOA Section 3[5]).

English Language Learner (ELL) – 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 (WIOA Section.3{21} and WIOA Section 203[6]).

POLICY

I. Youth Eligibility Criteria

- A. To be eligible to participate in the WIOA youth program, an individual must meet the generally eligibility criteria outlined below and meet the additional criteria outlined for an Out-of-School (OS) youth or In-School (IS) youth.
- B. Eligibility is determined at intake. The participant information is collected during registration and these criteria follow the participant through the entire course of WIOA programs and services attached to that application. If the participant's circumstances change during the WIOA registration cycle (such as a change in age, education status, employment status, etc.) the participant remains eligible for those services until exited. Examples are provided below:

1. An individual who is an OS youth at time of enrollment and is subsequently placed in school is still considered an OS youth. Additionally, an individual who is an OS youth and between the ages of 16-24 at the time of enrollment, and is now beyond the age of 24, is still considered an OS youth until exited.
 2. An individual who is an IS youth and between the ages of 14-21 at the time of enrollment, and is now beyond the age of 21, is still considered an IS youth until exited.
- C. Eligibility for services should not be construed as a guarantee of services. The WIOA is not an entitlement program.
- D. Employment and training opportunities must be provided to youth who can benefit from, and are most in need of, such opportunities.
- E. Eligibility criteria must be documented in the participant file prior to the provision of WIOA services. Service Providers will complete the WANB Youth Eligibility Determination Form (form 109) to identify youth eligibility.

This form includes disability as an eligibility criterion and therefore must be maintained in accordance with the Nondiscrimination and Equal Opportunity Procedures. Any medical or disability-related information, including information that could lead to the disclosure of a disability, must be collected separately and maintained apart from any other information about the individual, and treated as confidential. Program staff who are responsible for documenting eligibility, where disability is an eligibility criterion for a program or activity may be informed and have access to the information in the related files.

II. General Eligibility Criteria

All youth must meet the following general eligibility criteria:

- A. Authorization to Work
- B. Compliance with Selective Service Registration Requirements
- C. Age 14-24 on the "Date of Participation"

III. Out-of-school (OS) Eligibility Criteria– In order to receive services as an OS youth, an individual must meet the following eligibility criteria:

- A. Not be attending any secondary or postsecondary school (not including Title II Adult Education, YouthBuild, Job Corps, high school equivalency programs [except if program is funded by the public K-12 school system and youth attending are classified by the school system as still enrolled in school], non-credit bearing postsecondary classes, dropout reengagement programs or charter schools with federal and state workforce partnerships).
- B. Not younger than age 16 or older than age 24 years.
- C. Have one or more of the following barriers:
 1. A school dropout.
 2. A youth who is within the age of compulsory school attendance but has not attended school for at least the most recent complete school year quarter.
 - a) If the school does not use school year quarters, use calendar quarters.
 3. A recipient of a secondary school diploma or its recognized equivalent who is a low-income individual and is either basic skills deficient or an English language learner.
 4. An offender.

5. A homeless individual or a runaway.
 6. An individual in foster care or who has aged out of the foster care system or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under Section 477 of the Social Security Act, or in an out-of-home placement.
 7. An individual who is pregnant or parenting (custodial and non-custodial parent including non-custodial fathers).
 8. An individual with a disability.
 9. A low-income individual who requires additional assistance to enter or complete an educational program to secure or hold employment.
- IV. In-school (IS) Eligibility Criteria – In order to receive services as an IS youth, an individual must meet the following eligibility criteria:
- A. Be attending school, including secondary and postsecondary school.
 - B. Age 14-21 years old (A youth with disabilities who is in an individualized education program at the age of 22 may be enrolled as an IS youth).
 - C. Low income individual.
 - D. Have one or more of the following barriers:
 1. Basic skills deficient.
 2. An English language learner.
 3. An offender.
 4. A homeless individual or runaway.
 5. An individual in foster care or who has aged out of the foster care system or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under Section 477 of the Social Security Act, or in an out-of-home placement.
 6. Pregnant or parenting (custodial and non-custodial parent including non-custodial fathers).
 7. An individual with a disability.
 8. An individual who requires additional assistance to complete an educational program or secure and hold employment.

V. Additional Assistance –

No more than five percent of IS youth enrolled in a given program year may be found eligible solely on meeting the criterion, “requires additional assistance.” The five percent shall be calculated for each service provider within the Alliance, based upon the percent of newly enrolled participants during a program year. Service providers that choose to enroll under this category without the total number of enrollments required for compliance risk disallowed costs as the youth would not technically be eligible for the WIOA youth program.

In some instances, the Alliance may grant a service provider permission to enroll a youth under this criterion, based upon the total number of enrollments throughout the consortium. This permission must be obtained in writing/email prior to the enrollment of the youth and placed in the participant file with other eligibility documentation.

The Alliance defines additional assistance to include the following:

- A. Has repeated at least one secondary grade level or is one year over age for grade;
- B. Has a core GPA of less than 1.5;
- C. For each year of secondary school, are at least 2 semester credits behind the rate required to graduate from high school;
- D. Emancipated youth;
- E. Previous dropout; or has been suspended 5 or more times; or has been expelled;
- F. Has court/agency referral mandating school attendance;
- G. Deemed at risk of dropping out of school by school official;
- H. Referred to/being treated by an agency for a substance abuse related problem;
- I. Has experienced recent traumatic events, victim of abuse, or resides in abusive environment documented by a school official or other qualified professional;
- J. Has serious emotional, medical or psychological problems documented by a qualified professional.

And, for OS youth,

- K. Has never held a job;
- L. Has been fired within the 12 months prior to application;
- M. Has never held a full-time job for more than 13 consecutive weeks.

VI. Determining School Status – School status is determined at the time of program enrollment and remains the same throughout the youth's participation in the WIOA program.

- A. IS youth - If a youth is enrolled in the WIOA youth program during the summer and is in between school years, they are considered an IS youth if they are enrolled to continue school in the fall. A youth is also considered IS if they are enrolled into the youth program between high school graduation and postsecondary education if they are registered for postsecondary education, even if they have not yet begun postsecondary education at the time of WIOA youth program enrollment.
- B. OS youth – If the youth graduated from high school and registers for postsecondary education, but does not ultimately follow through with attending postsecondary education, they are considered an OS youth as long as the eligibility determination is made after the point they decide not to attend postsecondary education.

VII. Non-Credit Bearing Postsecondary Classes –

- A. IS youth – If a youth is enrolled in any credit-bearing postsecondary education classes, including credit-bearing community college classes and credit-bearing continuing education, then they are considered to be attending postsecondary education and are an IS youth.
- B. OS youth – If the youth is only enrolled in non-credit bearing postsecondary classes, they are not considered to be attending postsecondary education and are an OS youth.

VIII. Low Income Exception – The WIOA maintains a five percent low-income eligibility exception where five percent of WIOA youth may be participants who ordinarily would need to be low-income. This includes:

- A. IS youth who is not low-income but would otherwise qualify as an IS youth; or

B. OS youth who is not low-income but:

1. Is recipient of a secondary school diploma or its recognized equivalent who is either basic skills deficient; or an English language learner; and/or
2. Requires additional assistance to enter or complete an educational program or to secure or hold employment.

The 5% exception shall be calculated for each service provider within the Alliance, based upon the percent of newly enrolled participants during a program year that would ordinarily be required to meet the low-income criteria. Service providers that choose to enroll under this category without the total number of enrollments required for compliance with this exception risk disallowed costs as the youth would not technically be eligible for the WIOA youth program.

In some instances, the Alliance may grant a service provider permission to enroll a youth under this exception, based upon the total number of enrollments throughout the consortium. This permission must be obtained in writing/email prior to the enrollment of the youth and placed in the participant file with other eligibility documentation.

IX. Low-Income Determination – All IS youth and some categories of OS youth must meet low income guidelines to qualify for WIOA services (unless they qualify for the 5% low income exception). Low-income is defined as:

A. Public Assistance –

An applicant 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 established under the Food and Nutrition Act of 2008, the program of block grants to States for temporary assistance for needy families program under part A of title IV of the Social Security income program established under title XVI of the Social Security Act, or State or local income-based public assistance.

B. Free or Reduced Lunch –

Eligible to receive a free or reduced lunch under the Richard B. Russell National School Lunch Act, In schools where the whole school automatically receives free or reduced price lunch, WIOA programs must base low-income status on an individual student's eligibility to receive free or reduced price lunch or the youth's ability to meet one of the other low-income categories under WIOA.

If an OS youth is a parent living in the same household as a child who receives or is eligible to receive free or reduced priced lunch based on their income level, then such an OS youth would meet the low-income criteria based on his/her child's qualification.

C. Living in a High Poverty Area -

WIOA contains a provision that allows for youth living in a high-poverty area to automatically meet the low-income criterion. A high-poverty area is defined as a Census tract or a county that has a poverty rate of at least 25 percent as set every 5 years using American Community Survey (ACS) 5-Year data. The youth's physical address must be used to determine the high poverty area. The ACS 5-Year data can be accessed on the U.S. Census Fact Finder website to determine the poverty rate.

D. Homeless Individual –

A homeless individual who meets the criteria as defined in:

1. Violence Against Women Act of 1994, Section 41403(6)

2. McKinney-Vento Homeless Assistance Act, Section 725(2)

E. Foster Child –

A foster child on behalf of whom State or local government payments are made.

F. Individual with a Disability (ISY Only) –

Are an individual with a disability whose own income meets the income requirement but who is a member of a family whose income exceeds the income requirement.

G. Low-Income/Family Size Determination –

The individual receives or is a member of a family that received a total family income, for the six-month period prior to WIOA registration, that does not exceed the higher of the poverty line or 70 percent of the lower living standard income level.

Income is determined by collecting information from the family for the complete six-month period prior to application. This figure is then doubled (annualized) and compared to a table provided via Directive by the State of California to determine whether the youth is considered low income based upon family size and total reported “annualized” income.

Sources of Income –

1. The following sources of income should be included in an individual’s income calculations:

- a) Monetary compensation for services, including wages, tips, salary, commissions, or fees before any deductions
- b) Unemployment Insurance Payments
- c) Child Support payments
- d) Net receipts from non-farm self-employment (receipts from a person’s own unincorporated business, professional enterprise, or partnership, after deductions for business expenses)
- e) 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)
- f) Regular payments from railroad retirement, strike benefits from union funds, worker’s compensation, and training stipends (e.g., wages from the California Conservation Corp)
- g) Alimony, military family allotments, or other regular support from an absent family member or someone not living in the household
- h) Private pensions, government employee pensions (including military retirement pay)
- i) Regular insurance or annuity payments (including state disability insurance)
- j) College or university scholarships (not needs-based), grants, fellowships, and assistantships
- k) Net gambling or lottery winnings
- l) Severance payments
- m) Terminal leave pay

- n) Social Security Disability Insurance (SSDI) payments (Title II of the Social Security Act, Federal Old Age, Survivors and Disability Insurance)
 - o) Social Security Old Age, Survivors and Disability Insurance (OASI benefits received under Section 202 of the Social Security Act.
2. The following income sources should not be included in an individual's income calculation:
- a) Foster care child payments
 - b) Need-based public assistance payments (including Temporary Assistance for Needy Families, supplemental security income (SSI), emergency assistance money payments, and non-federally funded general assistance or general relief money payments)
 - c) Social Security old age and survivors' insurance benefit payments
 - d) Financial assistance under Title IV of the Higher Education Act (i.e., Pell Grants)
 - e) Supplemental Educational Opportunity Grants and Federal Work Study
 - f) Needs-based scholarship assistance
 - g) Loans
 - h) Veterans benefits
 - i) Income 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
 - j) Capital gains
 - k) Any assets drawn down as withdrawals from a bank, the sale of property, a house or a car
 - l) Tax refunds, gifts, loans, lump-sum inheritances, one-time insurance payments, or compensation for injury
 - m) 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
 - n) The value of food and fuel produced and consumed on farms
 - o) The imputed value of rent from owner occupied nonfarm or farm housing
 - p) Medicare, Medicaid, food stamps, school meals and housing assistance
 - q) Allowances, earnings and payments to individuals participating in programs under WIOA (except on-the-job training wages).

POLICY UPDATE HISTORY

Date Board Approves – New Policy

INQUIRIES

Questions regarding this policy can be sent to Operations Unit.

YOUTH ELIGIBILITY DETERMINATION

Name: _____

Age: _____

Date of Birth: _____

I-9 verification: _____

Household Income

Household Member Name	Relationship	Income	Verification
1. _____	_____	\$ _____	_____
2. _____	_____	\$ _____	_____
3. _____	_____	\$ _____	_____

Total Household Income: \$ _____ Income Guidelines for Household Size: \$ _____

Out-of-School Youth

- ☐ 16-24 years old
- ☐ Not attending any secondary or post-secondary school (doesn't include Adult Ed. Job Corps, YouthBuild, school equivalency, or dropout reengagement programs unless funded by Public K12)

Criteria Met:

- ☐ a. A school dropout;
- ☐ b. A youth who is within the age of compulsory school attendance but has not attended school for at least the most recent complete school year calendar quarter.
(If the school does not use the quarter system use calendar quarters);
- ☐ c. A recipient of a secondary school diploma or its recognized equivalent who is a **low-income** individual **and** is either basic skills deficient or an English language learner;
- ☐ d. An Offender;
- ☐ e. A homeless individual or a runaway;
- ☐ f. An individual in foster care or has aged out of the foster care system, or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under section 477 of the *Social Security Act*, or in an out-of-home placement.
- ☐ g. An individual who is pregnant or parenting (custodial and non-custodial parent including non-custodial fathers)
- ☐ h.. An individual with a disability.
- ☐ i. A **low-income** individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.
*Additional assistance criteria on page #2

In-School Youth

- ☐ 14-21 years old
- ☐ Attending school (includes secondary/post-secondary)
- ☐ Low income individual

Criteria Met:

- ☐ a. Basic skills deficient; (At or below 8.9)
- ☐ b. An English language learner;
- ☐ c. An offender;
- ☐ d. A homeless individual, or a runaway;
- ☐ e. An individual in foster care or has aged out of the foster care system, or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under section 477 of the *Social Security Act*, or in an out-of-home placement.
- ☐ f. Pregnant or parenting (custodial and non-custodial parent including non-custodial fathers);
- ☐ g. An individual with a disability;
- ☐ j. An individual who requires additional assistance to complete an education program or secure and hold employment.
*Additional assistance criteria on page #2

Verification:

Additional Assistance Criteria Met:

- ☐ Has repeated at least one secondary grade level or is one year over age for grade;
- ☐ Has a core GPA of less than 1.5;
- ☐ For each year of secondary school, are at least 2 semester credits behind the rate required to graduate from high school;
- ☐ Emancipated youth;
- ☐ Previous dropout; or has been suspended 5 or more times; or has been expelled;
- ☐ Has court/agency referral mandating school attendance;
- ☐ Deemed at risk of dropping out of school by school official;
- ☐ Referred to/being treated by an agency for a substance abuse related problem;
- ☐ Has experienced recent traumatic events, victim of abuse, or resides in abusive environment documented by a school official or other qualified professional;
- ☐ Has serious emotional, medical or psychological problems documented by a qualified professional.

(Below applies to Out of School Youth only)

- ☐ Has never held a job;
- ☐ Has been fired within the 12 months prior to application
- ☐ Has never held a full-time job for more than 13 consecutive weeks.

Verification:

YOUTH PROGRAM

PURPOSE

The purpose of this policy is to provide guidance to Workforce Alliance of the North Bay (Alliance) service providers on the requirements of the Workforce Innovation and Opportunities Act (WIOA) Youth Program.

SCOPE

Workforce Innovation and Opportunity Act Title, I contracted Service Providers

RESPONSIBLE PARTY

Workforce Alliance of the North Bay
Regional Workforce Development Board

REFERENCES

- Workforce Innovation Opportunities Act
- Workforce Services Directive (WSD) 17-07, WIOA Youth Program Requirements
- Workforce Services Directive (WSD) 16-19, Youth Service Eligible Provider List
- Training and Employment Guidance Letter - TEGL 21-16 Third Workforce Innovation and Opportunity Act (WIOA) Title I Youth Formula Program Guidance
- Training and Employment Guidance Letter - TEGL 31-10 Increasing Enrollment and Improving Services to Youth with Disabilities

DOCUMENTS

- WANB Form #108 WIOA 14 Youth Program Elements

DEFINITIONS

Comprehensive Guidance and Counseling – as defined in the DOL Final Rule, Section 681.510, provides individualized counseling to participants. This includes drug and alcohol abuse counseling, mental health counseling, and referral to partner programs, as appropriate.

Entrepreneurial Skills Training – as defined in the DOL Final Rule, Section 681.560, provides the basics of starting and operating a small business.

Job Shadowing – as defined in TEGL 21-16, is a work experience option where youth learn about a job by walking through the workday as a shadow to a competent worker. The job shadowing experience is a temporary, unpaid exposure to the workplace in an occupational area of interest to the participant. A job shadowing experience can be anywhere from a few hours, to a day, to a week or more.

Leadership Development Opportunities – as defined in the DOL Final Rule, Section 681.520, are opportunities that encourage responsibility, confidence, employability, self-determination, and other positive social behaviors.

Mentoring – as defined in the DOL Final Rule, Section 681.490, must:

- a. Last at least 12 months and may take place both during the program and following exit from the program;
- b. Be a formal relationship between a youth participant and an adult mentor that includes structured activities where the mentor offers guidance, support, and encouragement to develop the competence and character of the mentee; and
- c. Match the youth with an individual mentor with whom the youth interacts on a face to face basis (group mentoring activities and mentoring through electronic means are allowable as long as face-to-face interaction also occurs).

Occupational Skills Training – as defined in the DOL Final Rule, Section 681.540, is an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels, with priority consideration to training programs that lead to recognized post-secondary credentials that align with in-demand industry sectors or occupations in the local area.

Positive Social and Civic Behaviors – as defined in the DOL Final Rule, Section 681.530, are outcomes of leadership opportunities, which are incorporated by local programs as part of their menu of services. Positive social and civic behaviors focus on areas that may include the following:

- a. Positive attitudinal development;
- b. Self-esteem building;
- c. Openness to work with individuals from diverse backgrounds;
- d. Maintaining healthy lifestyles, including being alcohol and drug-free;
- e. Maintaining positive social relationships with responsible adults and peers, and contributing to the well-being of one's community, including voting;
- f. Maintaining a commitment to learning and academic success;
- g. Avoiding delinquency; and
- h. Positive job attitudes and work skills.

Pre-apprenticeship – as defined in the DOL Final Rule, Section 681.480, is a program designed to prepare individuals to enter and succeed in an apprenticeship program registered under the National Apprenticeship Act of 1937 (referred to as a "registered apprenticeship" program) and includes the following elements:

- a. Training and curriculum that aligns with the skill needs of employers in the economy of the State or region involved;
- b. Access to educational and career counseling and other supportive services, directly or indirectly;
- c. Hands-on, meaningful learning activities that are connected to education and training activities, such as exploring career options, and understanding how the skills acquired through coursework can be applied toward a future career;
- d. Opportunities to attain at least one industry-recognized credential; and
- e. A partnership with one or more registered apprenticeship programs that assists in placing individuals who complete the pre-apprenticeship program in a registered apprenticeship program.

Supportive Services – as defined in WIOA Law Section 3(59), means services such as transportation, childcare, dependent care, housing, and needs-related payments, that are necessary to enable an individual to participate in activities authorized under this Act.

Work Experiences – as defined in the DOL Final Rule, Section 681.600, are a planned, structured learning experience that takes place in a workplace for a limited period of time. Work experience may be

paid or unpaid, as appropriate. A work experience may take place in the private for-profit sector, the non-profit sector, or the public sector.

POLICY

I. Intake Process

- A. The Intake process is conducted by service provider program staff with the applicant to determine interest and eligibility for the WIOA youth program. Program staff will complete the data entry into the CalJOBS (the State of California's participant tracking system) application. All required data and information collection and maintenance are to be conducted per Alliance policies. This process is to include, but not be limited to:
 1. Completion of the program application with applicants signature, applicants parent signature if required, and program staffs signature.
 2. Collection of documentation to substantiate applicants eligibility. This may include a signed release of information to allow the program staff to assist the applicant in collection of documentation to substantiate eligibility.
 - a) Testing to determine Basic Skills Deficiency may be conducted during the Intake Process to help determine eligibility, and if the applicant's enrolled, must be completed within 60 days of the participant's first youth program service.
 3. Explanation and collection of signed acknowledgements for WIOA provisions for Nondiscrimination and Equal Opportunity and Grievance and Complaint procedures.
- B. After the program staff determines the youth's need for, ability to benefit from, and eligibility for services, the service provider will have senior staff review the information and documentation and approve the applicant for program enrollment. The reviewer is to sign the application to authenticate they have completed this review.

II. Enrollment

Enrollment into the WIOA youth program must occur within 45 days of the date of application. In CalJOBS, an individual is considered enrolled in WIOA as of the "Participation Date" that is recorded under the Create Participation section. After information is entered in to the Create Participation section, to fully enroll the youth, the program staff must create an Objective Assessment (Activity 412), Individual Service Strategy (Activity 413) and one other service activity.

A youth may participate only in "412" and "413" activities but DOL has determined that each youth must receive at least one of the 14 program elements outlined under WIOA in order to be considered a participant. In instances where a youth does not receive services beyond "412" and "413," the system will soft exit the participant 90 days after the completion of date of the last activity, and this individual will NOT be included in performance standard calculations. These youth will also be excluded from enrollment number calculations when the Alliance calculates average cost per enrollment figures for the youth program.

- III. Program Design – Service providers will be responsible for administering a youth program model that meets the requirements as described in the Alliance's Request for Proposal (RFP) and Alliance contracts. The youth program must include the required youth program elements as described under WIOA Law, Department of Labor (DOL), and EDD guidance. The program design framework consists of an objective assessment, an individual service strategy, case management, and follow-up services that lead toward successful outcomes for youth participants.

- IV. Objective Assessment - WIOA requires all eligible individuals enrolled in the Youth program must receive an objective assessment that will assess the academic levels, skill levels, and service needs of each participant, which includes a review of basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs, and developmental needs reviewed for the purpose of identifying appropriate services and career pathways for participants.
1. The "begin date" of the "412-Objective Assessment" activity must be the same date as the "Participation Date."
 2. A new Objective Assessment of a participant is not required if the service provider determines it is appropriate to use a recent assessment of the participant conducted pursuant to another education training program. However, this must be documented in CalJOBS.
- B. Individual Service Strategy - The second activity WIOA requires is an individual service strategy (ISS) developed based on the needs of each youth that is directly linked to one or more performance indicators and that shall identify career pathways that include education and employment goals, appropriate achievement objectives, and appropriate services for the participant, taking in to account the Objective Assessment results. This must be entered as the "413-Develop Service Strategies IEP/ISS/EDP." (The "actual begin date" for this activity can be the same date as the "actual begin date" for the objective assessment activity or a later date.)
1. The ISS is the overall case strategy and plan for the youth. It is to be developed in partnership with the youth and changes over time. It is a living document that must be updated as activities change, achievements are made, and supportive services are issued or addressed.
- C. Case Management – The case management component of the WIOA youth program is conducted throughout the entirety of the youth's participation. Case management is essential to the success of WIOA service delivery. Case management activities consist of the following, but are not limited to:
1. Direct customer service –objective assessment, ISS development, career planning, coordination of supportive services, referrals, job and work experience placement, outreach, and follow-up.
 2. Monitoring and documenting eligibility, services, and outcomes – Accurate and timely data entry in to CalJOBS, ensuring eligibility and documentation requirements are met according to the latest EDD Technical Assistance Guide (TAG) or DOL standards, determining the appropriate time to exit a youth from program participation and monitoring program exits and performance outcomes.
 3. Provide at a minimum a monthly contact documented in case notes.
 4. Utilize the Alliance technical assistance, policies, and forms for WIOA Youth program service delivery.
 5. Provide the specific services to support youth, based on the youth's assessment and service strategy, from within the fourteen program elements under WIOA.
- D. Follow up – Follow up is one of the fourteen program elements under WIOA. All youth participants must receive follow up services for a minimum duration of 12 months after exit. The types of services provided must be determined based on the needs of the individual and therefore, the intensity of follow up services may differ for each participant. Follow up services must include more than only a contact attempted or made for securing

documentation in order to report a performance outcome. Follow up services must follow the guidelines outlined in the Alliance's Follow Up policy.

A participant exit date is determined as follows:

1. After a participant has completed their last service under the WIOA program, a case closure must be entered into CalJOBS. Ninety days after the closure date, CalJOBS will soft exit the participant from the WIOA program. The soft-exit process will record the exit date to match the end date of the last reported service in CalJOBS.
2. If additional services are required, the case closure has been entered, but the 90 days have not yet lapsed, the case closure shall be deleted, and a new activity will be entered with a start date reflecting the date the service began. The 90 day "exit" clock will be reset and will begin again upon the entry of the next case closure.
3. If additional services are required after the 90-day period lapses, the individual must begin the application/registration process again. The eligibility documentation must be updated to reflect the circumstances of the individual on the date of the new application.

V. Program Elements

The service provider must have available all of the fourteen program elements identified in WIOA Section 129(c)(2) to provide to youth participants. Although, all 14 program elements must be available in the local area, it is not required all are provided to each participant. The service provider has the flexibility to determine what specific services a youth will receive based upon the youth's Objective Assessment and ISS.

Program elements may be available by leveraging resources from other partner programs or other community resources. Referrals to these resources should be made, as appropriate.

The provided 14 elements shall be recorded on the WANB form 108, WIOA 14 Youth Program Elements. This form is used to record the elements what were provided and who provided them.

- A. **Program Element 1:** Tutoring, study skills training, and evidence-based dropout prevention and recovery strategies that lead to completion of secondary school diploma or its recognized equivalent or for a recognized postsecondary credential.
 1. Strategies under this element must lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential.
 2. Tutoring, study skills training, and instruction services focus on providing academic support, helping a youth identify areas of academic concern, assisting with overcoming learning obstacles, and providing tools and resources to develop learning strategies. This element may be provided one-on-one or in a group setting, through resources or workshops. This element does not include training services that lead to recognized postsecondary credentials.
 3. Secondary school dropout prevention strategies intended to lead to a high school diploma include services and activities that keep a youth participant in school and engaged in a formal learning and/or training setting. Strategies include, but are not limited to, tutoring, literacy development, active learning experiences, after-school opportunities, and individualized instruction.
- B. **Program Element 2:** Alternative secondary school services, or dropout recovery services, as appropriate.

1. Alternative secondary school services, such as basic education skills training, individualized academic instruction, and English as a Second Language training, are those that assist youth who have struggled in traditional secondary education. Dropout recovery services, such as credit recovery, counseling, and educational plan development, are those that assist youth who have dropped out of school. These services are to be provided with the goal of helping participants to re-engage and persist in education that leads to the completion of a recognized high school equivalent.
- C. **Program Element 3:** Paid and unpaid work experiences that have academic and occupational education as a component of the work experience, including the following:
1. Summer employment opportunities and other employment opportunities available throughout the school year
 2. Pre-apprenticeship programs
 3. Internships and job shadowing
 4. On-the-job training opportunities
- Labor standards apply in a work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act or applicable State law, exists. Work experiences must include academic and occupational education. The educational component may occur concurrently or sequentially with the work experience. Further academic and occupational education may occur inside or outside the work site. The work experience employer can provide the academic and occupational component, or it may be provided separately in the classroom or through other means. The academic and occupational education component refers to contextual learning that accompanies a work experience. It includes the information necessary to understand and work in specific industries and/or occupations.
- D. **Program Element 4:** Occupational skill training, which includes priority consideration for training program that lead to recognized postsecondary credentials that align with in-demand industry sectors or occupations.
1. Staff and/or youth service providers must give priority consideration for training programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in the local area. Individual Training Agreements (ITAs) may be utilized for OS youth. Although IS youth may not use youth program funded ITAs, IS youth between the ages of 18 and 21 may co-enroll in the WIOA Adult program and may receive training services through an ITA funded by the adult program.
- E. **Program Element 5:** Education offered concurrently with and in the same context as workforce preparation activities and training for specific occupation or occupational cluster.
1. This program element reflects an integrated education and training model and allows workforce preparation activities and/or basic academic skills to be taught within the same time frame and connected to hands-on occupational skills training in a specific occupation, occupational cluster, or career pathway.
- F. **Program Element 6:** Leadership development opportunities, including community service and peer-centered activities encouraging responsibility, and other positive social and civic behaviors.

1. Leadership development opportunities may include community service and peer-centered activities encouraging responsibility and other positive social and civic behaviors. Activities may include:
 - a) Exposure to postsecondary educational possibilities;
 - b) Community and service-learning projects;
 - c) Peer-centered activities, including peer mentoring and tutoring;
 - d) Organizational and teamwork training, including team leadership training;
 - e) Training in decision-making, including determining priorities and problem solving;
 - f) Citizenship training, including life skills training such as parenting and work behavior training;
 - g) Civic engagement activities which promote the quality of life in a community; and
 - h) Other leadership activities that place youth in a leadership role such as serving on youth leadership committees.
- G. **Program Element 7:** Supportive services. For further detail on supportive services, see WANB Policy #1001 "Supportive Services."
- H. **Program Element 8:** Adult mentoring for a duration of at least 12 months that may occur both during and after program participation.
 1. Adult mentoring must last at least 12 months and may take place during the period of participation or following program exit. Mentoring may include workplace mentoring where the local program matches a youth participant with an employer or employee of the company. Youth providers should ensure appropriate processes are in place to adequately screen and select mentors. If mentors are sparse, case managers may serve as mentors.
- I. **Program Element 9:** Follow up services for not less than 12 months after the completion of participation.
 1. Follow-up services are critical services provided for a minimum of 12 months after a youth exits from the program to help ensure the youth is successful in employment and/or postsecondary education. All youth participants must be offered an opportunity to receive follow-up services that align with their ISS and must be provided follow-up services for a minimum of 12 months unless the participant declines to receive follow-up services, or the participant cannot be located or contacted.
 2. Follow-up services must include more than only a contact attempted or contact made for securing documentation in order to report a performance outcome.
 3. Follow-up services may begin immediately following the last expected date of service in the youth program when no future services are scheduled. Follow-up services do not cause the exit date to change and do not trigger re-enrollment in the program.
 4. Follow-up services may include (but must begin after exit to count as follow-up services):
 - a. Regular contact with a youth participant's employer, including assistance in addressing work-related problems that arise;
 - b. Supportive services;

- c. Adult mentoring;
 - d. Financial literacy education;
 - e. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
 - f. Activities that help youth prepare for and transition to postsecondary education and training.
- J. **Program Element 10:** Comprehensive guidance and counseling, including drug and alcohol abuse counseling, as well as referrals to counseling, as appropriate to the needs of the individual youth.
- 1. Comprehensive guidance and counseling provides individualized counseling to participants. This may include drug and alcohol abuse counseling and referral to partner programs, as appropriate. When referring participants to necessary counseling that cannot be provided by the local youth program or its service providers, the local youth program must coordinate with the organization it refers to in order to ensure continuity of service.
- K. **Program Element 11:** Financial literacy education.
- 1. Financial literacy education may include activities which:
 - a. Support the ability of participants to create budgets, initiate checking and savings accounts at banks, and make informed financial decisions;
 - b. Support participants in learning how to effectively manage spending, credit, and debt; including student loans, consumer credit, and credit cards;
 - c. Teach participants about the significance of credit reports and credit scores, what their rights are regarding their credit and financial information, how to determine the accuracy of a credit report and how to correct inaccuracies, and how to improve or maintain good credit;
 - d. Support a participant's ability to understand, evaluate, and compare financial products, services, and opportunities and to make informed financial decisions;
 - e. Educate participants about identity theft, ways to protect themselves from identity theft, and how to resolve cases of identity theft and in other ways understand their rights and protections related to personal identity and financial data;
 - f. Support activities that address the particular financial literacy needs of non-English speakers, including providing the support through the development and distribution of multilingual financial literacy and education materials;
 - g. Support activities that address the particular financial literacy needs of youth with disabilities, including connecting them to benefits planning and work incentives counseling;
 - h. Provide financial education that is age appropriate, timely, and provides opportunities to put lessons into practice, such as by access to safe and affordable financial products that enable money management and savings; and
 - i. Implement other approaches to help participants gain the knowledge, skills, and confidence to make informed financial decisions that enable them to attain greater financial health and stability by using high quality, age-appropriate, and

relevant strategies and channels; including, where possible, timely and customized information, guidance, tools, and instruction.

L. Program Element 12: Entrepreneurial skills training.

1. Entrepreneurial training must develop the skills associated with entrepreneurship. Such skills may include, but are not limited to, the ability to:
 - a. Take initiative;
 - b. Creatively seek out and identify business opportunities;
 - c. Develop budgets and forecast resource needs;
 - d. Understand various options for acquiring capital and the trade-offs associated with each option; and
 - e. Communicate effectively and market oneself and one's ideas.
2. Approaches to teaching youth entrepreneurial skills include, but are not limited to, the following:
 - a. Entrepreneurship education that provides an introduction to the values and basics of starting and running a business. Entrepreneurship education programs often guide youth through the development of a business plan and also may include simulations of business start-up and operation;
 - b. Entrepreneurship development which provides supports and services that incubate and help youth develop their own businesses. Enterprise development programs go beyond entrepreneurship education by helping youth access small loans or grants that are needed to begin business operation and by providing more individualized attention to the development of viable business ideas; and
 - c. Experiential programs that provide youth with experience in the day-to-day operation of a business. These programs may involve the development of a youth-run business that young people participating in the program work in and manage. Or, they may facilitate placement in apprentice or internship positions with adult entrepreneurs in the community.

M. Program Element 13: Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career counseling, and career exploration services.

1. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area may include career awareness, career counseling, and career exploration services. Labor market information tools may be utilized to help participants make effective decisions about education and careers, as well as facilitate awareness of career fields that are likely to provide long-term employment and earnings in the local labor market.
2. Career awareness begins the process of developing knowledge of the variety of careers and occupations available. Career exploration is the process in which youth choose an educational path and training or a job that fits their interests, skills and abilities. Career counseling or guidance provides advice and support in making decisions about what career paths to take. Career counseling services may include providing information about resume preparation, interview skills, potential opportunities for job shadowing, and the long-term benefits of postsecondary education and training.

N. **Program Element 14:** Activities that help youth prepare for and transition to postsecondary education and training.

1. This element includes activities that help youth prepare for and transition to postsecondary education and training after attaining a high school diploma or its recognized equivalent. These services include exploring postsecondary education options, including technical training schools, community colleges, four-year colleges and universities, and registered apprenticeships. Additional services include, but are not limited to, assisting youth to prepare for SAT/ACT testing; assisting with college admission applications, searching and applying for scholarships and grants, filling out financial aid applications, and connecting youth to postsecondary education programs.

VI. Expenditure Requirements

- A. Out of School Youth – WIOA shifts the primary focus of youth formula funds to support the educational and career success of OSY. At least 75% of the WIOA youth formula allocation must be spent on workforce investment activities for OSY, after subtracting funds spent on administrative costs.
- B. Work Experience (WEX) – WIOA places a priority on providing youth with occupational learning opportunities through WEX. At least 20% of the WIOA youth formula allocation must be spent on WEX. The WEX expenditure rate is calculated after subtracting funds spent on administrative costs. Additionally, the expenditure rate is not applied separately for In-School Youth and Out of School Youth. WEX activities include the following:
 1. Summer employment opportunities and other employment opportunities throughout the year.
 2. Pre- apprenticeship programs
 3. Internships and Job shadowing
 4. On-the-job training (OJT)

VII. Work Experience (WEX)

WEX provides youth an invaluable opportunity to develop workplace skills. Paid and unpaid WEX must include **academic and occupational education** and may include the program elements.

The required academic and occupational education (e.g., workforce preparation activities, basic academic skills, and hands-on occupational skills training) must be taught within the same time frame and connected to training in a specific occupation, occupational cluster, or career pathway.

- A. Youth formula funds may be used to pay wages and related benefits for WEX in the public, private, for profit or non-profit sectors when the participant's Objective Assessment and ISS indicate that a WEX is appropriate. Additionally, youth formula funds may be used to pay wages and staffing costs for the development and management of WEX. Staff costs incurred for the functions and activities directly serving participants may count as program costs such as:
 1. Staff time spent identifying potential work experience opportunities.
 2. Staff time working with employers to develop the work experience.
 3. Staff time spent working with employers to ensure a successful work experience.
 4. Staff time spent evaluating the work experience.
 5. Classroom training or the required academic education component directly related to the work experience.
 6. Orientation sessions for participants and employers.
 7. Incentive payment to youth for an achievement directly tied to the work experience.

8. Employability skills/job readiness training to prepare youth for a work experience.

All work experience activities must be paid experiences, with the exception of Pre-Apprenticeship and Job Shadowing activities. Youth WEX participants may be assigned paid WEX positions, with an hourly pay rate to be determined at the time of WEX assignment, which will be the employer's entry level wage for the similar position, but no less than State minimum wage and not to exceed \$15 per hour.

B. Youth WEX placements will be time-limited using the following criteria:

1. Youth WEX participants in OJT shall have a contract established with the OJT provider. All OJT contracts shall be limited to a period of time required for a participant to become proficient in the occupation for which the training is being provided, not to exceed 6 months under normal circumstances. In determining the appropriate length of the contract, consideration will be given to the skill requirements of the occupation, the academic and occupation skill level of the participant, prior work experience, and the participant's individual employment plan. OJT contract time periods which exceed 6 months will need the Alliance's Workforce Development Board (WDB) Director review prior to approval, and any exceptions granted by the WDB Director will not exceed a total contract time period of 12 months. All OJTs must follow the guidelines outlined in the Alliance's OJT policy.

C. Youth WEX participants in any youth WEX program which is not OJT shall have placements time-limited not to exceed 6 months or 480 hours in duration under normal circumstances. Exceptions to this time limit can be proposed to the WDB Director on an individual basis, allowing for a 6-month extension when approval has been obtained by the WDB Director.

All minors under 18 years of age employed in the State of California must have a permit to work. [EC49160; LC 1299] The Federal Fair Labor Standards Act also requires a certificate of age for working minors. The State Permit to Employ and Work ("Permit") is accepted as the Federal certificate [EC 49110, 49112, 49113, 49116]. A youth participant, under 18 years of age and assigned to WEX, must have a copy of their permit to work in the case file.

Workers' compensation benefits must be available for injuries suffered by the participant while performing WEX activities.

VIII. Individual Training Accounts (ITA) – ITA's are only allowable for OSY, aged 16-24. ITAs may only be utilized for training vendors that appear on the State of California's Eligible Training Provider List (ETPL). WIOA Youth funds may not be utilized to fund an ITA for an OSY with a training provider that is headquartered outside of California and does not have an in-state training facility, even if the provider is listed on another State's ETPL.

IX. Braiding Funds – Braiding funds is the process of using different funding streams to support different needs for the same participant while maintaining documentation to support the charging and allocations of cost to the separate funds. Service providers may use braided funds to provide more comprehensive services to participants and maximize partner resources available to assist youth. Braiding funds must meet the following criteria:

- A. The cost of each funding stream is tracked, documented, and allocated based on the proportional benefit.
- B. The cost benefits two or more programs in proportions that can be determined without undue effort or cost.

- C. The youth meets the eligibility requirement for each program from which they are receiving funds.

An example is when the WIOA Title I youth program and the WIOA Title II adult education program are used to serve eligible youth. The WIOA Title I resources can provide career guidance, work experiences, and leadership development, while the WIOA Title II resources can provide adult education and literacy activities.

- X. System Validation and Monitoring

The Alliance will be responsible for the review of all WIOA case records for eligibility. The review will be based on the information and eligibility documents contained in the participant's file.

Case record information, documentation, and verifications must be retained for a minimum of three years. Additional guidelines are outlined in the Alliance's Oversight and Monitoring policy.

POLICY UPDATE HISTORY

Date Board Approves – New Policy

INQUIRIES

Questions regarding this policy can be sent to Operations Unit.

WIOA 14 Youth Program Elements

Youth Name: _____

Please indicate which 14 elements the participant was provided and who provided the service.

WIOA Youth 14 Elements	
<input type="checkbox"/>	Tutoring, study skills training, and evidence-based dropout prevention and recovery strategies that lead to completion of secondary school diploma or its recognized equivalent or for a recognized post-secondary credential.
<input type="checkbox"/>	Alternative secondary school services, or dropout recovery services, as appropriate.
<input type="checkbox"/>	Paid and unpaid work experiences that have academic and occupational education as a component of the work experience, including the following: <ul style="list-style-type: none"> <input type="checkbox"/> Pre-apprenticeship programs; <input type="checkbox"/> Internships and job shadowing; <input type="checkbox"/> On-the-job training opportunities;
<input type="checkbox"/>	Occupational skill training, which includes priority consideration for training programs that lead to recognized post-secondary credentials that align with in-demand industry sectors or occupations
<input type="checkbox"/>	Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster
<input type="checkbox"/>	Leadership development opportunities, including community service and peer-centered activities encouraging responsibility, and other positive social and civic behaviors
<input type="checkbox"/>	Supportive services
<input type="checkbox"/>	Adult mentoring for a duration of at least 12 months that may occur both during and after program participation
<input type="checkbox"/>	Follow-up services for not less than 12 months after the completion of participation
<input type="checkbox"/>	Comprehensive guidance and counseling, including drug and alcohol abuse counseling, as well as referrals to counseling, as appropriate to the needs of the individual youth
<input type="checkbox"/>	Financial literacy education
<input type="checkbox"/>	Entrepreneurial skills training
<input type="checkbox"/>	Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services
<input type="checkbox"/>	Activities that help youth prepare for and transition to post-secondary education and training

BOARD LETTER II.D



TO: REGIONAL WORKFORCE DEVELOPMENT BOARD EXECUTIVE COMMITTEE
FROM: STAFF
SUBJECT: BOARD LETTER II.D – RATIFY APPROVAL OF WORKFORCE ALLIANCE AGREEMENTS
DATE: OCTOBER 9, 2019
CC: FILE

JPA staff solicits Workforce Development Board Executive Committee approval for the following agreements and amendments enacted by the Governing Board:

CONTRACTOR	NEW/ AMENDMENT	AMOUNT	COMMENTS
Marin County Office of Education	New	\$15,000	Development of an apprenticeship program for the XR digital media program. Funded through donation from Wells Fargo.
Petaluma People Services Center	Amendment	\$164,275	Provision of WIOA youth services in Marin County
MPIC, Inc.	Amendment	\$1,458,259	Provision of WIOA Adult and Dislocated Worker service in Lake and Mendocino Counties
MPIC, Inc.	Amendment	\$537,190	Provision of WIOA program youth services in Lake and Mendocino Counties.
Racy Ming & Associates	Amendment	\$48,000	Amendment to provide program administration services for P2E grant and WIOA.

Paragraph 10 - Powers/ Responsibilities of the Agency exercised by the Governing Board of the JPA, states that the “Agency shall have the power to exercise any power common to all Member Counties authorized by Chapter 5 of Division 7 of Title 1 of the Government Code of the State of California (commencing with section 6500) and is hereby authorized to do all acts necessary for the exercise of these common powers, including...:

- (3) Employ agents, employees, consultants, advisors, independent contractors and other staff;
- (4) Make and enter into contracts, including contracts with public and private organizations and individuals;”

STAFF RECOMMENDATION:

Ratify agreements with the above noted contractors and partners and authorize board chair and/or executive director to sign final negotiated agreements.

Workforce Alliance of the North Bay Q4|PY18-19

CareerPoint Lake, Marin, Mendocino, & Napa

WIOA Levels of Service

Bronze Self Access Services



CareerPoint
5,754 Individuals
12,367 Visits
2,804 Repeat Customers

Silver Staff Assisted Services



WIOA Program
380 Participants
228 Adults
152 Dislocated Workers

Gold Training Services

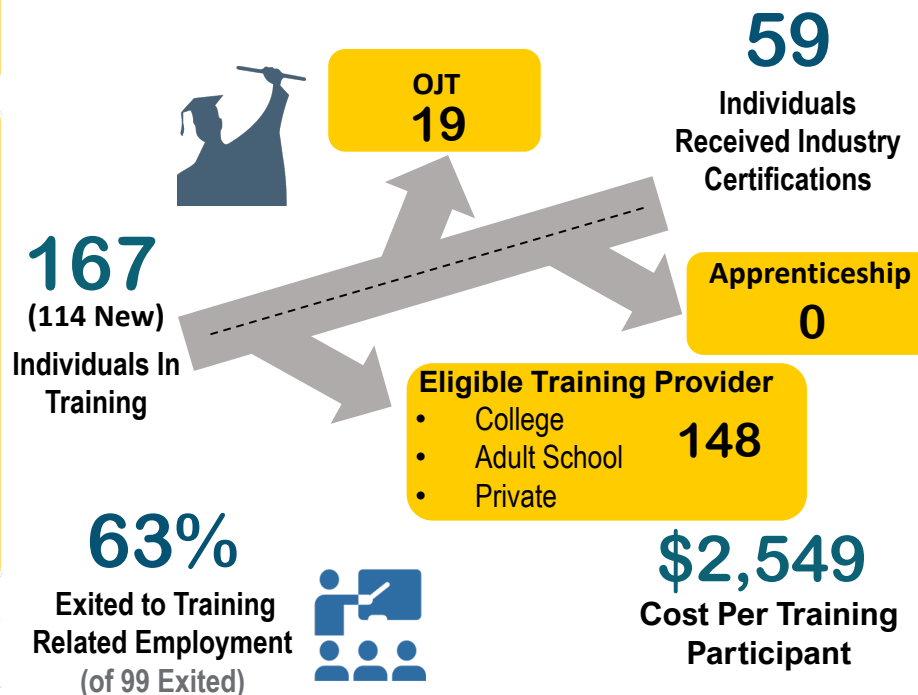


WIOA Training
167 Recipients
115 Adults
52 Dislocated Workers

\$427K

\$1.112M

WIOA Training Services



WIOA Program Employment Outcomes

198
Individuals
Exited



75%
Exit to
Employment

\$18.25
Median Wage



\$2.11/HR
Ave. Increase in Wages
After Using WDB Services



8
Avg months
in program



\$4,052
Cost per Job
Seeker Served

2%
Construction

33%
Healthcare &
Social Assistance

12%
Hospitality
& Tourism

9%
Manufacturing

1%
Professional,
Scientific, Technical

1%
Utilities

1%
Information

41%
Other*

WIOA Adult & DW Priority of Service



Basic Skill
Deficient
3%



Low Income
59%



CalFresh
39%



Military
Veterans
5%

Business Services

341

New Businesses
Engaged

6 Rapid Response
Events

1541

Active Business
Engagements

219 Recruitment
Events Held

WIOA Adult & DW Barriers to Employment



Disability
9%



Homeless
3%



Justice Involved
10%



English Language
Learner
4%



Single Parent
19%



In-School
Youth
11%



Out of School
Youth
89%

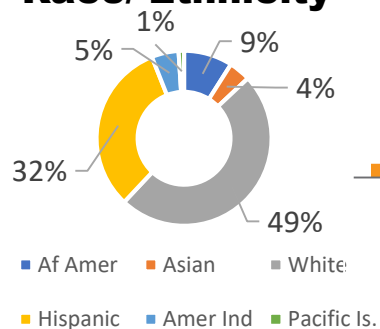


WEX
23%

WIOA Youth Details

Program Participant Demographics

Race/ Ethnicity

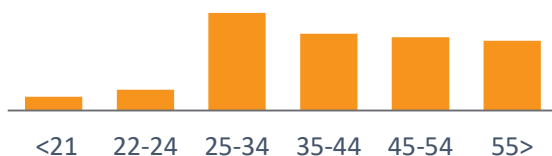


40%
Male



60%
Female

Age



Geographics

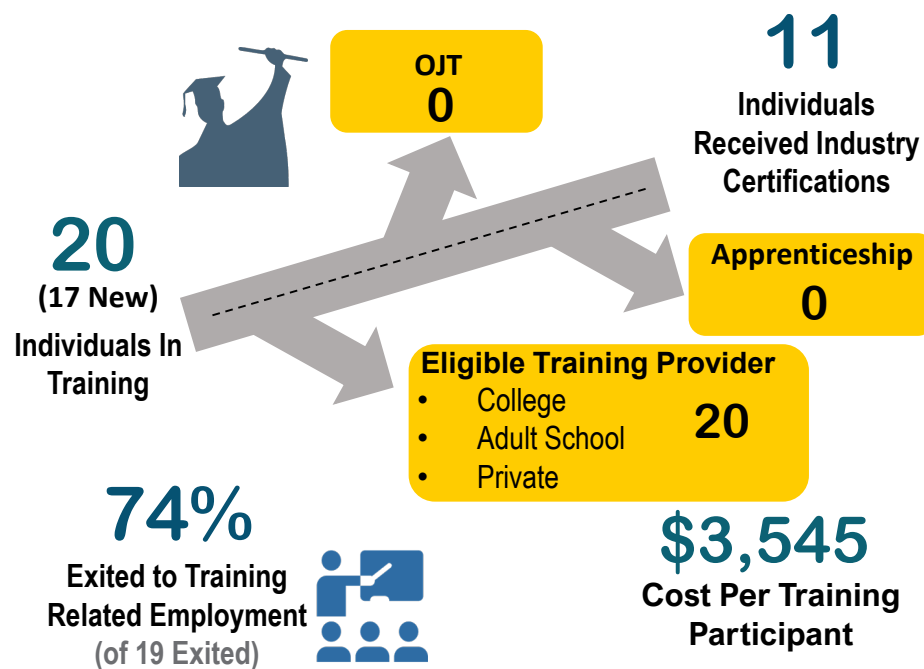
Cities of Residence

Clearlake 23%	Ukiah 58%	San Rafael 32%	Napa 61%
Kelseyville 18%	Willits 18%	Novato 26%	American Canyon 27%
Lakeport 18%	Redwood Valley 8%	Sausalito 5%	Napa Other 3%
Clearlake Oaks 10%	Hopland 4%	Greenbrae 3%	Unknown 2%
Nice 7%	Fort Bragg 3%	Marin Other 12%	Napa Other 3%
Lake Other 23%	Mendo. Other 8%	Unknown 4%	Unknown 2%
WANB Other 1%	North Bay Other 1%	North Bay Other 18%	North Bay Other 7%

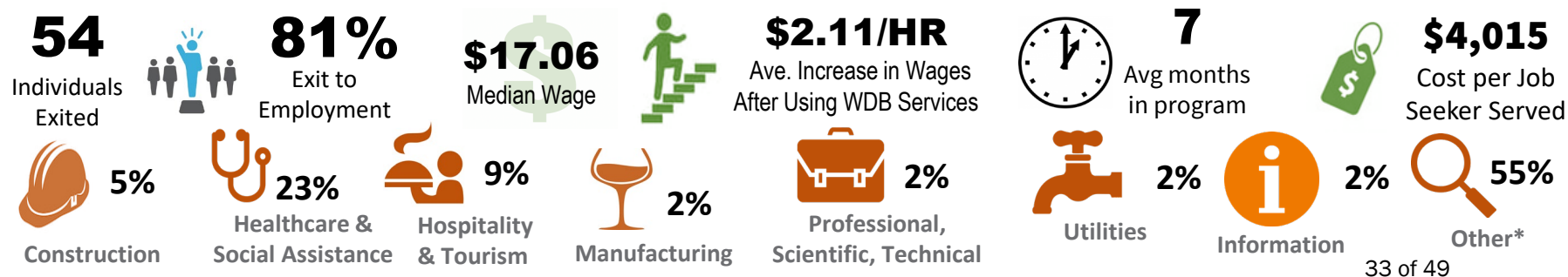
WIOA Levels of Service



WIOA Training Services



WIOA Program Employment Outcomes



WIOA Adult & DW Priority of Service



Basic Skill
Deficient
2%



Low Income
63%



CalFresh
40%



Military
Veterans
7%

Business Services

24

New Businesses
Engaged

33

Active Business
Engagements

0

Rapid Response
Events

0

Recruitment
Events Held

WIOA Adult & DW Barriers to Employment



Disability
1%



Homeless
0%



Justice Involved
8%



English Language
Learner
3%



Single Parent
18%



In-School
Youth
7%



Out of School
Youth
93%

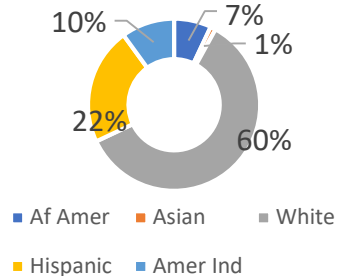


WEX
38%

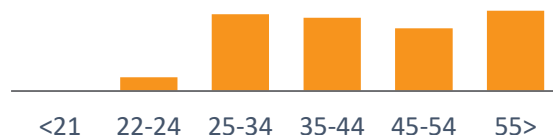
WIOA Youth Details

Program Participant Demographics

Race/ Ethnicity



Age



41%
Male



59%
Female

Geographics

Cities of Residence

Clearlake 23%

Kelseyville 18%

Lakeport 18%

Clearlake Oaks 10%

Nice 7%

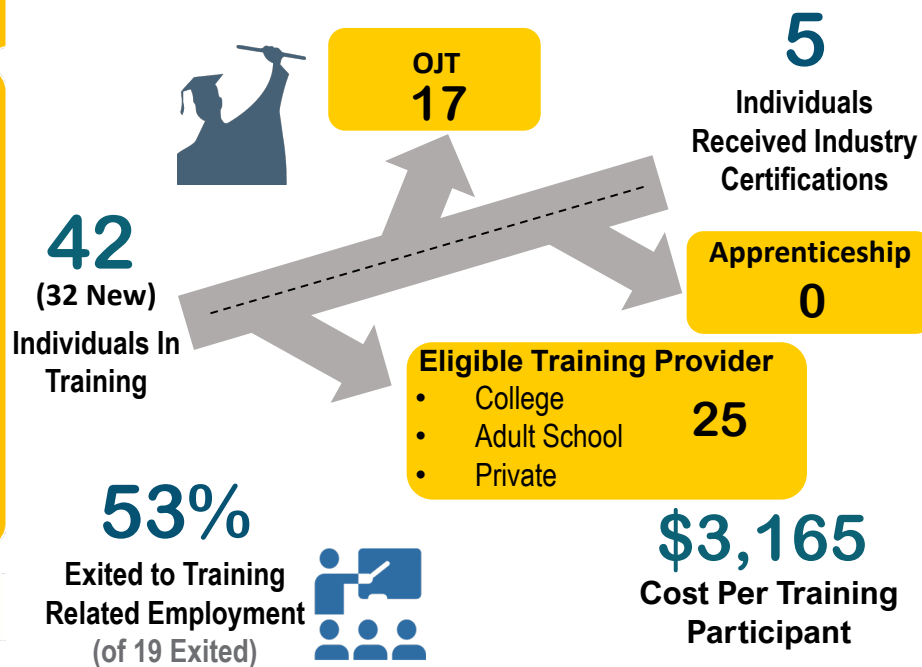
Lake Other 23%

WANB Other 1%

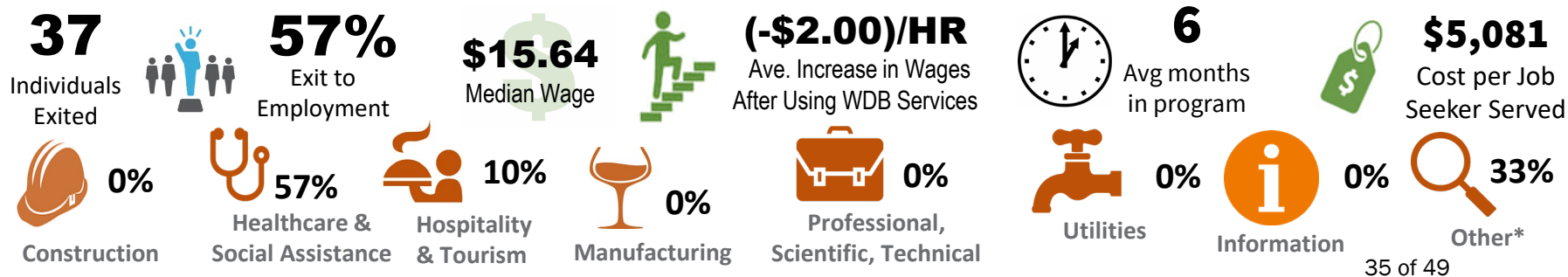
WIOA Levels of Service



WIOA Training Services



WIOA Program Employment Outcomes



WIOA Adult & DW Priority of Service



Basic Skill
Deficient
5%



Low Income
69%



CalFresh
59%



Military
Veterans
2%

Business Services

24

New Businesses
Engaged

2

Rapid Response
Events

826

Active Business
Engagements

214

Recruitment
Events Held

WIOA Adult & DW Barriers to Employment



Disability
6%



Homeless
8%



Justice Involved
17%



English Language
Learner
10%



Single Parent
29%



In-School
Youth
21%



Out of School
Youth
79%

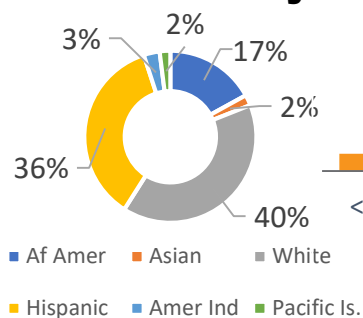


WEX
0%

WIOA Youth Details

Program Participant Demographics

Race/ Ethnicity



Age



39%
Male



61%
Female

Geographics

Cities of Residence

San Rafael 32%

Novato 26%

Sausalito 5%

Greenbrae 3%

Marin Other 12%

Unknown 4%

North Bay Other 18%

WIOA Levels of Service

Bronze Self Access Services



CareerPoint
1,869 Individuals
6,890 Visits
1013 Repeat Customers

\$80K

Silver Staff Assisted Services



WIOA Program
79 Participants
35 Adults
44 Dislocated Workers

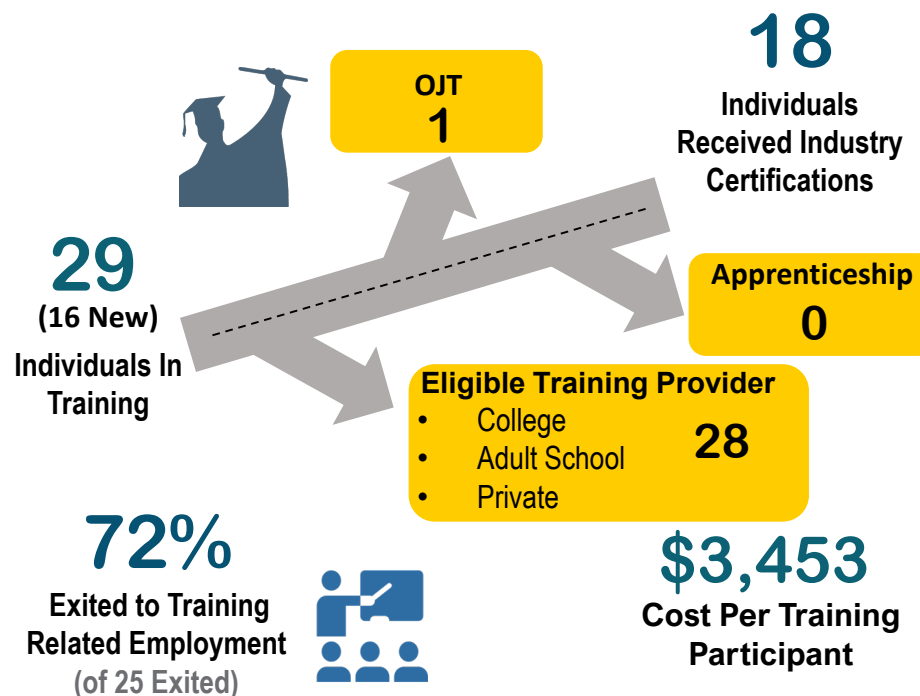
\$289K

Gold Training Services

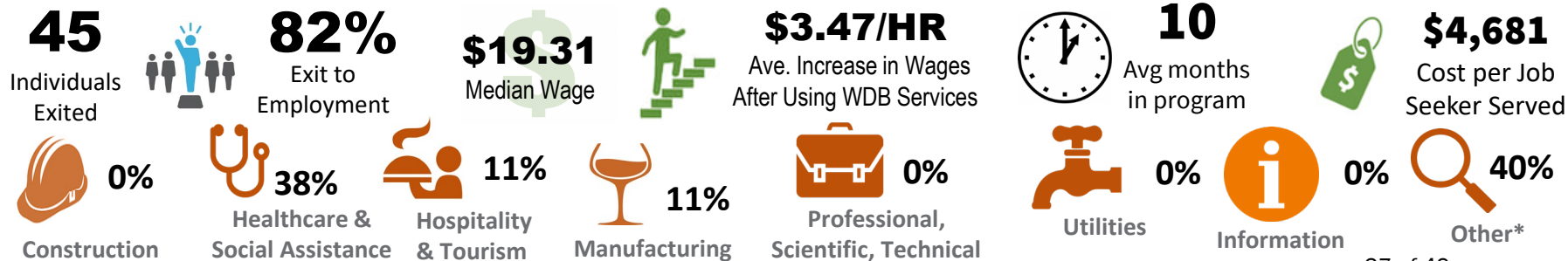


WIOA Training
29 Recipients
20 Adults
9 Dislocated Workers

WIOA Training Services



WIOA Program Employment Outcomes



WIOA Adult & DW Priority of Service



Basic Skill
Deficient
1%



Low Income
40%



CalFresh
16%



Military
Veterans
10%

Business Services

22

New Businesses
Engaged

3

Rapid Response
Events

402

Active Business
Engagements

5

Recruitment
Events Held

WIOA Adult & DW Barriers to Employment



Disability
6%



Homeless
3%



Justice Involved
4%



English Language
Learner
1%



Single Parent
9%



In-School
Youth
15%



Out of School
Youth
85%

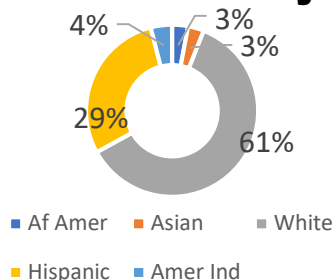


WEX
57%

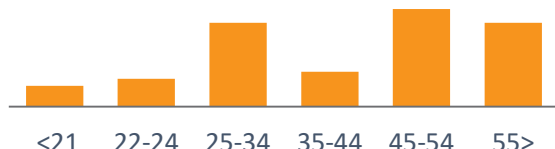
WIOA Youth Details

Program Participant Demographics

Race/ Ethnicity



Age



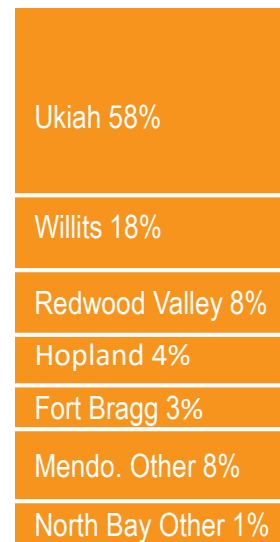
39%
Male



61%
Female

Geographics

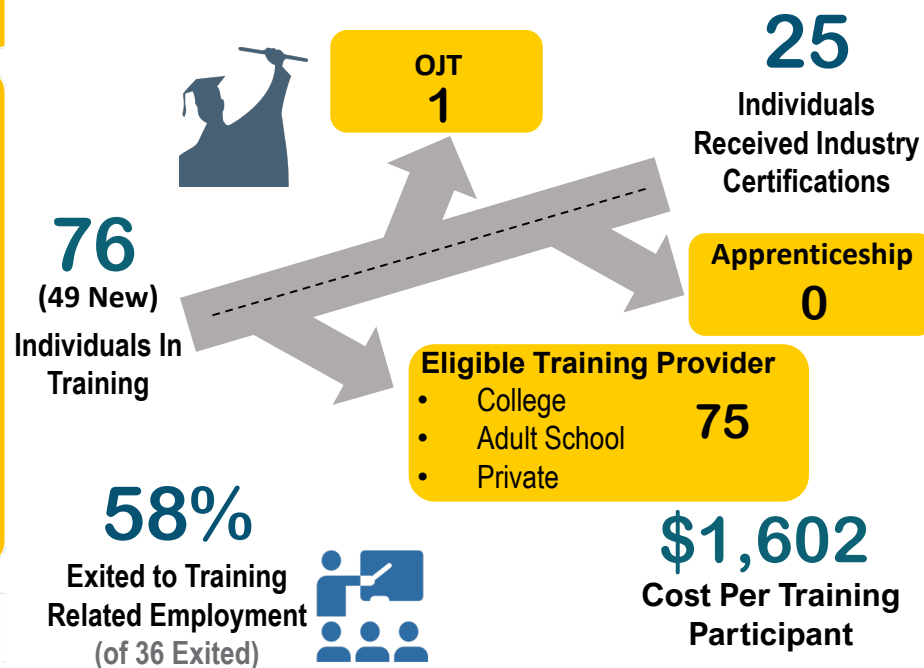
Cities of Residence



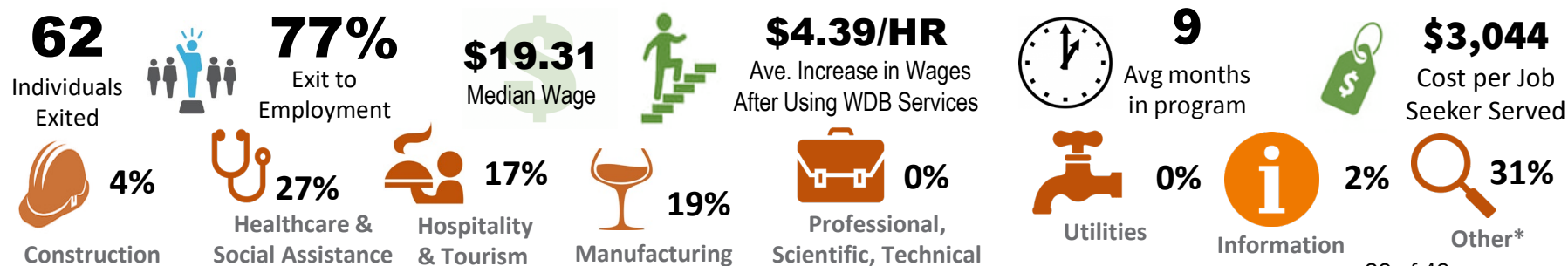
WIOA Levels of Service



WIOA Training Services



WIOA Program Employment Outcomes



WIOA Adult & DW Priority of Service



Basic Skill
Deficient
4%



Low Income
64%



CalFresh
39%



Military
Veterans
1%

Business Services

271

New Businesses
Engaged

280

Active Business
Engagements

1

Rapid Response
Events

0

Recruitment
Events Held

WIOA Adult & DW Barriers to Employment



Disability
22%



Homeless
1%



Justice Involved
11%



English Language
Learner
2%



Single Parent
21%



In-School
Youth
5%



Out of School
Youth
95%

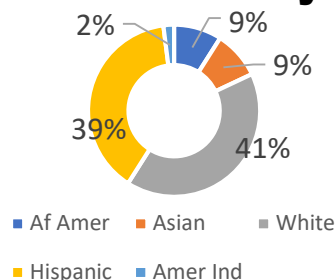


WEX
5%

WIOA Youth Details

Program Participant Demographics

Race/ Ethnicity

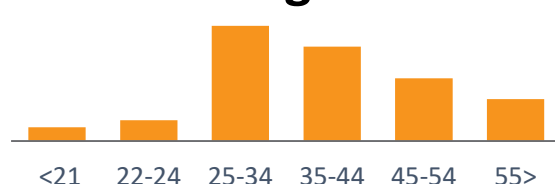


42%
Male



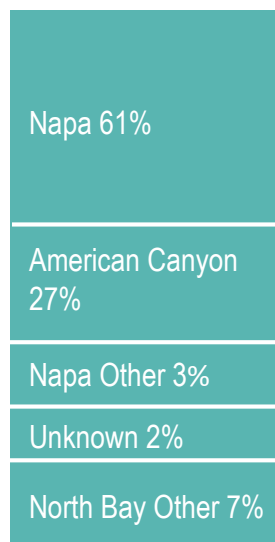
58%
Female

Age




Geographics


Cities of Residence



Workforce Alliance of the North Bay
Providers of Services Report
Program Year 2018-2019
Quarter 4, 100% of Program Year

			Carry-ins from PY17-18	New Clients	Total Enrolled			Placements Area Plan = 80%			Exits Area Plan = 80%			Training Requirement - (20%) Area Plan = 100%			Contract Budget Quarter 4			
					(Qtr 4) Actual	Area Plan for PY	% Achieved of Qtr 4	(Qtr 4) Actual	Area Plan for PY	% Achieved of Qtr 4	(Qtr 4) Positive Exits	(Qtr 4) Negative Exits	(Qtr 4) % of Positive Exits to Total Exits	WIOA Funds Spent	Requirement- 20%	% Achieved of Training	(Qtr 4) Expended	Budget in PY	Total % Achieved	Combined
Lake	MPIC	Adult	16	28	44	52	85%	27	16	169%	27	3	90.0%	\$ 30,614	\$ 46,120	66.4%	\$175,332	\$190,934	91.8%	87%
		Dislocated Worker	11	32	43	44	98%	17	13	131%	17	7	70.8%	\$ 12,366	\$ 38,563	32.1%	\$130,984	\$159,651	82.0%	
Mendocino	MPIC	Adult	22	13	35	47	74%	17	19	89%	17	5	77.3%	\$ 40,928	\$ 45,424	90.1%	\$173,750	\$188,054	92.4%	89%
		Dislocated Worker	9	35	44	40	110%	20	9	222%	20	3	87.0%	\$ 17,086	\$ 38,811	44.0%	\$138,001	\$160,677	85.9%	
Marin	Marin HHS	Adult	27	43	70	69	101%	20	20	100%	20	15	57.1%	\$ 58,427	\$ 67,315	86.8%	\$269,570	\$278,686	96.7%	91%
		Dislocated Worker	1	12	13	30	43%	1	2	50%	1	1	50.0%	\$ 13,777	\$ 44,139	31.2%	\$152,189	\$182,733	83.3%	
Napa	Napa HHSA	Adult	22	57	79	47	168%	28	32	88%	28	10	73.7%	\$ 62,789	\$ 41,646	150.8%	\$172,413	\$172,413	100.0%	100%
		Dislocated Worker	12	40	52	64	81%	20	46	43%	20	6	76.9%	\$ 56,504	\$ 54,683	103.3%	\$226,386	\$226,386	100.0%	
System Totals			120	260	380	393		150	157		150	50		\$292,491	\$376,701	77.6%	\$1,438,625	\$1,559,534	92%	

Enrolled	Placements	Exits	Training	Contract Budget
100% and above	100% and above	80% and above	100% and above	Greater than 100%
85% to 99.9%	85% to 99.9%	70% to 79.9%	Below 100%	90% to 100%
Below 85%	Below 85%	69.9% and below		80% to 89.9%
				79.9% or below
				Missing invoices

			Carry-ins from PY17-18	New Clients	Total Enrolled			Placements Area Plan = 80%			Exits Area Plan = 80%			20% Work Experience Requirement Area Plan = 100%			Contract Budget Quarter 4		
					(Qtr 4) Actual	Area Plan for PY	% Achieved of Qtr 4	(Qtr 4) Actual	Area Plan for PY	% Achieved of Qtr 4	(Qtr 4) Positive Exits	(Qtr 4) Negative Exits	(Qtr 4) % of Positive Exits to Total Exits	WIOA Funds Spent	Requirement- 20%	% Achieved of Training	(Qtr 4) Expended	Budget in PY	Total % Achieved
Lake	MPIC	Youth	8	5	13	29	45%	4	9	44%	4	5	44.4%	\$ 26,518	\$ 33,802	78.5%	\$136,705	\$152,109	89.9%
Mendocino	MPIC	Youth	12	9	21	30	70%	8	10	80%	8	7	53.3%	\$ 23,894	\$ 32,817	72.8%	\$107,587	\$147,676	72.9%
Marin	PPS	Youth	3	11	14	22	64%	1	2	50%	1	0	100.0%	\$ 4,073	\$ 35,159	11.6%	\$94,216	\$158,215	59.5%
Napa	Napa HHSA	Youth	24	14	38	56	68%	7	28	25%	7	18	28.0%	\$ 5,237	\$ 42,935	12.2%	\$67,737	\$193,206	35.1%
System Totals			47	39	86	137		20	49		20	30		\$59,722	\$144,713	41.3%	\$406,245	\$651,206	62%

ATTACHMENT III.A



STATEMENT OF WORK

This Statement of Work ("SOW"), effective **July 1, 2019**, submitted in connection with Community Action Marin (CAMARIN) and Technology4Life (T4Life) with an Effective Date of July 1, 2019, is hereby agreed to by the Parties.

Community Action Marin
By: _____

Technology4Life
By: _____

Name: Chandra Alexandre
Title: Executive Director
Date: July 1, 2019

Name: Nicole Engler & Linda Siegel
Title: Co-Founders
Date: July 1, 2019

Vendor will provide Train the Trainer workshop & Curriculum Design services between July 1, 2019 and XXX, 2019.

PROJECT BACKGROUND

- Community Action Marin is seeking to improve communication and collaboration within the organization. CAMARIN has adopted innovations such as E-Mail and Workplace intranet but these tools have not been fully utilized due to the gap in digital literacy of employees. CAMARIN has identified the need for a base level of technology competency to enable employees to fully engage and provide guidance with the leadership team and organization.
- CAMARIN staff need support in understanding the following core areas: Basic Computer Skills, Outlook E-mail, Workplace intranet.

PROJECT SCOPE & DELIVERABLES

- **The Community Action Marin team** is seeking a custom curriculum to be delivered to a cohort of employees over a 6-week period between XXX, 2019 and XXX, 2019. Training will include hands-on classes for the cohort, supplement handouts and documentation for continued learning. The goal would be for the cohort to be able to bring training back to their teammates.
- Classes will be delivered in English. All handouts and training materials will be provided in English and Spanish.
- Technology4Life will support the CAMARIN cohort by designing and developing training sessions for staff who may not have technology literacy.
- Technology4Life will complete the following activities to support these goals including:
 - Facilitate up to four pre-training design discussions with CAMARIN stakeholders
 - Document training outcomes and plan
 - Prepare training presentation materials, modules, handouts, and exercises
 - Deliver 6 week (one 90 minute session per week) training to cohort
 - Administer evaluation surveys to be completed by students (pre- and post-class)
 - Facilitate wrap up evaluation meeting

PROJECT ASSUMPTIONS

- CAMARIN will provide a location for training. It is suggested to use the CareerPoint Marin Computer Lab. (Note: lab currently holds 8 student computers).
- CAMARIN will provide access to relevant materials (such as Workplace) during planning and curriculum development phase.
- Technology4Life will comply with project timelines assuming timely communication and feedback from project stakeholders.

FEE, MILESTONES, SCHEDULE

CAMARIN shall compensate Technology4Life for services. Costs for services shall not exceed \$5,500.00 without prior written approval from company

[Milestone/Task/Deliverable]	Dates (TBD)
Agree upon & write up specific target outcomes of project with CAMARIN	
Revise SOW	
Both parties Sign final SOW agreement	
Create Outline of Curriculum for Cohort Classes	
CAMARIN gives written approval of outline of curriculum	
Design Lesson Plan, Handouts & supplemental materials	
Design Evaluation Surveys for students to complete before and at the end of training	
CAMARIN gives written approval of all handouts and surveys	
Translate materials and handouts to Spanish	
Deliver class #1-3	
Mid Session Review/feedback	
Deliver class #4-6	
Students are given post-class evaluation surveys	
Final discussion with CAMARIN regarding overall success of the program	

Billing Schedule

Vendor to bill full cost of training and any additional expenses, in incremental invoices to be payable within 30 days of receipt by CAMARIN.

Budget	
Planning Meetings, Project Management and Administration	\$ 500
Curriculum Development (Handouts in English, Lesson Plans, Evaluation Forms)	\$ 2,000
Translate curriculum handouts to Spanish	\$ 1,000
Training Sessions (6-90 minute classes)	\$ 2,000
Total Cost	\$5,500

<u>Payment Schedule (20% per phase)</u>	
Start of Program (Upon execution of contract)	\$1,100
Delivery of Curriculum Handouts	\$1,100
Delivery of Classes 1-3	\$1,100
Delivery of Classes 4-6	\$1,100
Completion of Evaluation	\$1,100

Estimated Schedule

Services will begin on July 1, 2019 after the execution of this SOW by both parties and will be completed by XXXX, 2019.

CONSULTANT BIO

Nicole Engler

Nicole Engler is the co-founder and principal curriculum designer at Technology4Life. Over the past 5 years, she has been helping individuals and agencies navigate the challenges of teaching older adults how to use technology in various forms.

Nicole Engler completed her undergraduate work in both Teacher Education and English Literature at Middlebury College in Vermont. At the same time, she discovered her love of teaching and obtained a teaching credential for secondary education. Later, she received a J.D. from U.C. Hastings College of the Law in San Francisco and remains an active member of the California State Bar.

Nicole began her teaching career as an English teacher for different high schools and later worked as a corporate trainer and Human Resources Generalist in the Private Client Services Division for Wells Fargo Bank, Inc. As a corporate trainer she taught diversity classes, business communication and management strategy seminars. Nicole's teaching methods are designed to reach various levels of adult learners using a hands-on, personal approach supporting a variety of individual learning styles.

For the last few years, Nicole has taught adult education courses throughout Marin County and San Francisco, including topics such as: How to use an iPad and iPhone, Introduction to Facebook, Intro to Social Media, PowerPoint, Excel, Photo Management, Internet Tips, Tech Tips for Transportation, and Introduction to Computers.

Nicole is a Novato resident and she is married with four children.

Linda Siegel

Linda is the co-founder and Chief Technical Officer at Technology4Life. As a Computer Science major at UC Berkeley, Linda hadn't really considered a career in film. But an internship at Skywalker Ranch as a database consultant led to more than twenty years at Lucasfilm. As a digital artist, she was responsible for lighting and compositing for feature films, earning credits on films such as Forrest Gump, the Star Wars prequels, and Pirates of the Caribbean. She was fortunate to work on the feather shots of Forrest Gump – which at the time were the longest computer graphics ever created.

In later years, Linda was responsible for technical training and artist management for LucasFilm, ImageMovers Digital and other leading animation and visual effects studios. She created training in software and production techniques, artist enrichment and development programs as well as outreach to educational institutions.

Linda works with adults in both the CareerPoint and Whistlestop Computer Labs as well as offering one-on-one consulting and computer support throughout Marin. She focuses on creating education that is interactive, practical and ensures the student is able to use and apply their knowledge.

Linda earned her B.S. in Computer Science at U.C. Berkeley and her MBA from Cal's Haas School of Business. She lives in Marin County with her husband, author Sheldon Siegel.

Employer Eligibility Criteria for Incumbent Worker Training:

The following factors must be measured and scored to determine if the WIOA Service Provider chooses to use WIOA funding. Each WIOA local subcommittee can set a unique minimum score for the Service Provider to proceed. The points are earned by using the following criteria:

1.	Is the Employer in an Industry Sector that qualifies for a First or Second Priority Tier Industry as detailed in The Alliance's Strategic Plan? (First Tier = 4 points, Second Tier = 2 points, Not a First or Second Tier industry = -2 points)	-2
2.	Will current employees lose jobs without training? (Yes = 2 points, No = 0 points)	2
3.	If employees are laid off, is the existing local labor market conducive for them to quickly become reemployed? (No = 2 points, Yes = 0 points)	2
4.	If employees are laid off because of skill deficiencies, does the local labor market have skilled job seekers that would meet the employer's needs? (No = 2 points, Yes = 0 points)	0
5.	What portion of vulnerable employees will get training? (90%-100% = 4 points, 50%-89% = 3 points, 20%-49% = 2 points, 10%-19% = 1 points, <10% = 0 points)	3
6.	When existing employees are trained and increase their skills, what will the extent of their higher wages be. (>20% = 5 points, 15%-20% = 4 points, 10%-15% = 3 points, 5%-10%=1 point, <5% = 0 points)	0
7.	Will employees who are not trained likely be laid off? (No = 0 points, Yes = 2 points)	0
8.	Will vulnerable employees (those who may not receive training and subsequently be laid off) fall under The Alliances Priority of Service definition? (Yes = 4 points, No = 0 points)	4
9.	Will the employer expand their workforce because trained employees are promoted, at least on a one to one ratio? (i.e., For every trained employee who is promoted, will the employer add an entry level job and expand their workforce?) (Yes = 6 points, No = 0 points)	0

10.	Will the training provide an industry recognized credential? (Yes = 4 points, No = 0 points)	0
11.	Will the learned skills enhance trained employees' portable skills in the industry and/or region? (i.e., Skills that can be transferable or "portable" and used productively in different employment contexts, jobs and enterprises, and their ease or degree of transferability. (Yes = 2 points, No = 0 points)	2
12.	What is the break-even point when wage gains equal WIOA investment? (A mathematical formula to evaluate the length of time the employees wage gain will surpass the WIOA investment.) (Less than 6 months = 10 points, >6 months to 12 months = 8 points, >12 months to 18 months = 4 points, between 18+ months and 24 months = 2 points, greater than 24 months = -2 points)	2
	Total Points	13

Community Action Marin

CURRICULUM PLAN

OVERALL PROJECT PURPOSE

Objectives:

- Increase employee communication surrounding work product
- Increase comfort with technology tools (such as Workplace) for giving and receiving feedback for both employee appreciation and areas of improvement
- Improve technical literacy and confidence
- Gain confidence in using a computer as a tool for sharing their voice

Skills:

- Digital Literacy: able to use site computers and smartphones
- Digital Engagement: interact on Workplace groups and Email
- Communication strategies and best practices

Content /Knowledge Targets:

- Student can turn on Site computers
- Student can use Outlook to:
 - receive and review email
 - send email
 - use SmartPhone app for Email
 - use calendar to set up meetings (optional if time allows)
- Student can connect to Workplace
 - Track and respond to postings
 - Join relevant groups
 - Post own success stories & challenges
 - Use Workplace chat to discuss with co-workers & bosses
 - Use smartPhone App
- Student will learn internet safety
 - Student will know how to identify suspicious on-line activity
 - Student will learn to evaluate email for safety
 - Student will learn to use safe browsing (Incognito mode) and securely log out of devices

- **Terminology/Vocabulary:**

- Students will understand the following terms: Start Menu, Download, Upload, Click, Double-Click, Desktop, Taskbar, Browser, Chrome, Workplace, Outlook, Icon, Application, Phishing, Password Safety

HOW WILL WE GAUGE STUDENT UNDERSTANDING?

Assessments

- Employee Survey: CAMarin will put out a survey to assess overall employee skill levels.
- Student Surveys: Students will complete pre and post session surveys created by Technology4Life to gauge their own understanding and enjoyment of their newfound skills both before and after our 6 week training session. They will also assess their own sense of connectedness and feeling part of a community to determine whether or not they feel more heard and confident with technology as a result of this project.

LEARNING ACTIVITIES:

- Predominant Learning style will be small group guided learning.
- Independent learning games and activities for practicing new skills will be provided by Technology4Life
- Ongoing learning will take place as they practice and review with co-workers. Some may even become trainers to other employees.

RESOURCES/MATERIALS:

- Technology4Life will provide specific student handouts with step by step instructions for how to accomplish specific tasks.
- Technology4Life will provide lesson plans in a train the trainer style binder.

TIMELINE:

See Statement of Work