



## WORKFORCE DEVELOPMENT BOARD MEETING

Thursday, September 15, 2022, 9:30 am

[www.work2future.org](http://www.work2future.org)

Susan Koepp-Baker, Chair

Priya Smith, MPH, Vice-Chair

### COVID-19 NOTICE

Consistent with AB 361 and City of San Jose Resolution Nos. 80628 and 80659, this meeting will not be physically open to the public. Committee members will be teleconferencing from remote locations.

Members of the public can observe the meeting by computer, smartphone, and tablet at <https://sanjoseca.zoom.us/j/97716797057?pwd=WFhvSjFMMzl1NGRXVUFRQWdUcnhzZz09>

To provide Spoken Public Comment *during* the meeting:

- a) **Phone** (408) 638-0968, Meeting ID 977 1679 7057, Passcode 989794. **Press \*9** to Raise a Hand to let the Chair know that you'd like to speak. **Press \*6** to Mute and Unmute yourself.
- b) **Online** using the [Zoom link](#) above: 1) Use the Zoom application or an up-to-date browser: Chrome 30+, Firefox 27+, Microsoft Edge 12+, Safari 7+. Certain functionality may be disabled in older browsers including Internet Explorer. Mute all other audio before speaking. Using multiple devices can cause audio feedback. 2) Enter an email address and name. The name will be visible online and will be used to notify you that it is your turn to speak. 3) When the Chair calls for the Agenda Item to which you wish to speak, click on the "Raise Hand" icon or command. Speakers will be notified shortly before they are called on to speak.

Please limit remarks to the time limit allotted by the meeting chair, normally two minutes.

To submit written Public Comment *before* the committee meeting: Send by e-mail to [Lawrence.Thoo@sanjoseca.gov](mailto:Lawrence.Thoo@sanjoseca.gov) by 8:00 am the day of the meeting. The e-mails will be posted with the agenda as "Letters from the Public". Please identify the Agenda Item Number in the subject line of your email.

To submit written Public Comment *during* the meeting: Send e-mail during the meeting to [Deanna.Walter@sanjoseca.gov](mailto:Deanna.Walter@sanjoseca.gov), identifying the Agenda Item Number in the e-mail subject line, to have the comments verbally read into the record, with a maximum of 250 words, which corresponds to approximately 2 minutes per individual comment, subject to the Chair's discretion. Comments received after the agenda item is heard but before the close of the meeting will be included as a part of the meeting record but will not be read into the record.

**WORKFORCE DEVELOPMENT BOARD MEMBERS**

September 2022

1. **Louise Auerhahn**  
Director of Economic & Workforce Policy  
Working Partnerships USA
2. **Rajiv Batra**  
Associate General Counsel  
Fundbox
3. **Ricardo Benavidez**  
Director of Infrastructure  
Google LLC
4. **Chad Bojorquez**  
Chief Program Officer  
Destination: Home
5. **George Chao, *Business Services Committee Chair***  
Director of Strategic Partnerships  
Manex
6. **John (Jack) Estill**  
Partner  
Coactify
7. **Joseph A. Flynn**  
COO  
Sourcewise
8. **Susan L. Koepp-Baker, *Board Chairperson***  
Principal  
Enviro-Tech Services
9. **Van T. Le**  
Trustee and Clerk of the Board  
East Side Union High School District  
Agent  
State Farm Insurance
10. **Maria Lucero**  
Deputy Division Chief, Region I  
Northern Division, Workforce Services Branch  
Employment Development Department, State of California
11. **Emily McGrath**  
Director of Workforce Development, Education  
& Training  
NextFlex
12. **Robert Moreno**  
Training Director  
Santa Clara County Electrical Joint Apprentice  
Training Center, IBEW
13. **Brian N. Murphy**  
Director of Training  
Pipe Trades Training Center  
UA Local 393
14. **Rafaela Perez**  
Employment Services Director  
Social Services Agency, County of Santa Clara
15. **Steve Preminger**  
Director, Office of Strategic &  
Intergovernmental Affairs  
County of Santa Clara
16. **Priya Smith, MPH, *Board Vice-Chairperson***  
Medical Group Administrator  
The Permanente Medical Group  
Kaiser Permanente San Jose
17. **Alan Takahashi**  
Vice President and General Manager  
Multifunction Microwave Solutions  
Cobham Advanced Electronic Solutions (CAES)
18. **Todd Teixeira, MA**  
Team Manager (SSM1), San Jose North Branch  
California Department of Rehabilitation
19. **Kishan Vujjeni**  
Co-chair  
South Bay Consortium for Adult Education  
Dean of College Transitions & Extension  
Programs  
San Jose Evergreen Community College District

**WORKFORCE DEVELOPMENT BOARD**

**September 15, 2022**

**9:30 am**

**MEETING AGENDA**

- |  |                                |
|--|--------------------------------|
| <b>I. CALL TO ORDER &amp; ROLL CALL</b>  |                                |
| <b>A. Introduction of New Board Members</b>  | <i>5 min<br/>9:35 am end</i>   |
| <b>II. CONSENT ITEMS {Action}</b>  |                                |
| Approve the acceptance of:   | <i>5 min<br/>9:40 am end</i>   |
| <b>A. Financial Status Report as of June 30, 2022 (revised)</b>  |                                |
| <b>B. Financial Status Report as of July 31, 2022</b>  |                                |
| <b>C. San Jose Works Report as of June 30, 2022</b>  |                                |
| <b>D. Minutes of the June 16, 2022, meeting</b>  |                                |
| <b>III. OPEN FORUM</b>   |                                |
| Members of the public may address the committee on matters not on the agenda   | <i>5 min<br/>9:45 am end</i>   |
| <b>IV. BUSINESS ITEMS</b>  |                                |
| <b>A. Director's Report {Information}</b>  |                                |
| <i>Monique Melchor, Director</i>   | <i>5 min<br/>9:50 am end</i>   |
| Reports on various matters of interest.  |                                |
| <b>B. WIOA Performance Report for Q4 of PY 2021 {Information}</b>  |                                |
| <i>Sangeeta Durrall, Program Services Manager</i>  | <i>10 min<br/>10:00 am end</i> |
| Preliminary report on Workforce Innovation and Opportunity Act (WIOA) program performance for the fourth quarter of Program Year 2021-22 (PY 2021).  |                                |
| <b>C. Amendments to Article VI of the work2future By-laws {Discussion}</b>   |                                |
| <i>Lawrence Thoo, Strategic Engagement Manager</i>   | <i>10 min<br/>10:10 am end</i> |
| Initial presentation of proposed amendments to Article VI (Committees) of the work2future By-laws to allow for the formation of an additional standing committee such as a Youth Committee.                                  |                                |
| <b>D. Labor Market Consultant Pool RFQ (Information)</b>   |                                |
| <i>Dat Luu, Contracts Manager</i>  | <i>5 min<br/>10:15 am end</i>  |
| Report on the preparation of a Request for Qualifications (RFQ) to establish a pre-qualified pool of consultants on which work2future can draw for specific research-and-analysis and other projects from 2023 through 2026. |                                |

**E. Ad Hoc RFP Committee {Information}**

5 min  
10:20 am end

*Chad Bojorquez, Ad Hoc RFP Committee Chair; Dat Luu, Contracts Manager*

Report on the recommendations of the Ad Hoc RFP Committee presented to the Executive Committee on July 21, 2022.

**F. Business Services (Information)**

10 min  
10:30 am end

*George Chao, Business Services Committee Chair, and staff*

Report on business services activities since the March 2022 Board meeting, including WARN and related response activity, the Workforce Accelerator Fund 9.0 grant-supported Career Accelerator pilot, career fairs and preparation of an Incumbent Worker Training support program.

**G. Labor Market Information {Information}**

10 min  
10:40 am end

*Lawrence Thoo, Strategic Engagement Manager*

Presentation on the Santa Clara County/San Jose-Sunnyvale-Santa Clara MSA labor market.

**V. OTHER**

Announcements, suggested agenda items for a future meeting, other housekeeping

**A. TBA**

**VI. ADJOURNMENT**

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Please note: *Times to the right of agenda items are estimates only of the duration of each item and its approximate ending time. Actual times may vary, and items may be taken out of order at the discretion of the chair.*

## **CITY OF SAN JOSE CODE OF CONDUCT FOR PUBLIC MEETINGS**

The Code of Conduct is intended to promote open meetings that welcome debate of public policy issues being discussed by the City Council, its Committees, and City Boards and Commissions in an atmosphere of fairness, courtesy, and respect for differing points of view.

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### **Novel Coronavirus (COVID-19) Precautions**

Consistent with the California Governor's Executive Order No. N-29-20, Resolution No. 79450 from the City of San José and the Santa Clara County Health Officer's March 16, 2020 Shelter in Place Order, the meeting will not be physically open to the public. Instead, the meeting will be conducted via on-line videoconference open to the public. The Code of Conduct will apply to the extent possible in a videoconference setting.

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1. Public Meeting Decorum:
  - a. Persons in the audience will refrain from behavior which will disrupt the public meeting. This will include making loud noises, clapping, shouting, booing, hissing or engaging in any other activity in a manner that disturbs, disrupts or impedes the orderly conduct of the meeting.
  - b. Persons in the audience will refrain from creating, provoking or participating in any type of disturbance involving unwelcome physical contact.
  - c. Persons in the audience will refrain from using cellular phones and/or pagers while the meeting is in session.
  - d. Appropriate attire, including shoes and shirts are always required in the meeting room.
  - e. Persons in the audience will not place their feet on the seats in front of them.
  - f. No food, drink (other than bottled water with a cap) or chewing gum will be allowed in the meeting room, except as otherwise pre-approved by City staff.
  - g. All persons entering the meeting room, including their bags, purses, briefcases and similar belongings, may be subject to search for weapons and other dangerous materials.
2. Signs, Objects or Symbolic Material:
  - a. Objects and symbolic materials, such as signs or banners, will be allowed in the meeting room, with the following restrictions:
    - i. No objects will be larger than 2 feet by 3 feet.
    - ii. No sticks, posts, poles or other such items will be attached to the signs or other symbolic materials.
    - iii. The items cannot create a building maintenance problem or a fire or safety hazard.
  - b. Persons with objects and symbolic materials such as signs must remain seated when displaying them and must not raise the items above shoulder level, obstruct the view or passage of other attendees, or otherwise disturb the business of the meeting.
  - c. Objects that are deemed a threat to persons at the meeting or the facility infrastructure are not allowed. City staff is authorized to remove items and/or individuals from the meeting room if a threat exists or is perceived to exist. Prohibited items include, but are not limited to: firearms (including replicas and antiques), toy guns, explosive material, and ammunition; knives and other edged weapons; illegal drugs and drug paraphernalia; laser pointers, scissors, razors, scalpels, box cutting

knives, and other cutting tools; letter openers, corkscrews, can openers with points, knitting needles, and hooks; hairspray, pepper spray, and aerosol containers; tools; glass containers; and large backpacks and suitcases that contain items unrelated to the meeting.

3. Addressing the Board or Committee:

- a. Persons wishing to speak on an agenda item or during open forum are requested to complete a speaker card and submit the card to the administrative staff at the meeting.
- b. Meeting attendees are usually given two (2) minutes to speak on any agenda item and/or during open forum; the time limit is in the discretion of the Chair of the meeting and may be limited when appropriate. Applicants and appellants in land use matters are usually given more time to speak.
- c. Speakers should discuss topics related to work2future business on the agenda, unless they are speaking during open forum.
- d. Speakers' comments should be addressed to the full body. Requests to engage Board or Committee Members or Staff in conversation will not be honored. Abusive language is inappropriate.
- e. Speakers will not bring to the podium any items other than a prepared written statement, writing materials, or objects that have been inspected by security staff.
- f. If an individual wishes to submit written information, he or she may give it to the administrative staff at the meeting.
- g. Speakers and any other members of the public will not approach the dais at any time without prior consent from the Chair of the meeting.

Failure to comply with this Code of Conduct which will disturb, disrupt or impede the orderly conduct of the meeting may result in removal from the meeting and/or possible arrest.

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All public records relating to an open session item on this agenda, which are not exempt from disclosure pursuant to the California Public Records Act, that are distributed to a majority of the legislative body will be available for public inspection online at [www.work2future.org](http://www.work2future.org) and at work2future's Business and Administrative Services Center at the Almaden Winery Community Center, 5730 Chambertin Drive, San Jose, California at the same time that the public records are distributed or made available to the legislative body.

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# **I**

## **Call to Order & Roll Call**

### **A. Introduction of New Board Members**

- Ricardo Benavidez
- Brian N. Murphy

# **II**

## **Consent Items**

### **Approval of the acceptance of:**

- A. Financial Status Report as of June 30, 2022 (revised)
- B. Financial Status Report as of July 31, 2022
- C. San Jose Works Report as of June 30, 2022
- D. Minutes of the June 16, 2022 meeting

**[Action]**



## **PRELIMINARY FINANCIAL STATUS AS OF JUNE 30, 2022**

### **Key Highlights**

- WIOA formula and Rapid Response carry-over funding from FY 2020-21 is fully spent.
- An extension for FY21-22 Rapid Response use of funds was granted by the State. Term end date was modified from June 30, 2022, to September 30, 2022. As of June 30, 2022, \$361,588 will be carried over to FY2022-23.
- At the end of the preliminary close as of June 30, 2022, work2future has \$4.30 million from the current Adult, Dislocated Worker, and Youth allocations to be carried over to FY 2022-23 representing:
  1. Board-mandated Reserve Account: \$896,420
  2. Unallocated Reserve Account: \$723,599
  3. Additional WIOA funding received in FY21-22: \$170
  4. Actual savings of \$2,677,001 which comprised of the following:
    - a. Savings from personnel costs generated by mandatory one-month separations from City employment for temporary unclassified positions whose assignments have or would have reached the maximum two-year employment period, unfilled vacant positions, and a portion of staff salaries budget that was transferred to other discretionary grants: \$425,875
    - b. Savings from non-personnel costs from maintenance, telephone, security services, website contracts, travel, other professional services, supplies, etc.: \$342,506
    - c. Savings from unspent contracted amount from service providers: \$443,048
    - d. Savings from unspent clients' training, workshop, OJT, and work experience budget: \$1,313,963
    - e. Savings from unspent clients' supportive services budget: \$151,609

### **Other Discretionary Funding**

- An additional funding of \$661,784—\$607,977 for P2E implementation and \$53,807 for work2future serving as the P2E program lead—has been awarded to work2future. The funds, in partnership with the Santa Clara County probation and other corrective systems organizations, will support training, job placement and supportive services to eligible re-entry individuals. In addition, work2future will provide grant coordination for the P2E project in the Bay-Area Peninsula Regional Planning Unit (RPU), comprised of four workforce development boards: San Francisco, NOVA, San Benito and work2future. For FY21-22, additional funds of \$228,207 was received by work2future to fund additional cohorts for the program. This brings the total grant amount to \$889,991. The grant term for this award is from September 1, 2019, to March 31, 2022. At the end of the grant term, approximately 99.63% of the funds has been spent.
- work2future received \$5,000 from the City of San Jose to assist WIOA clients in gathering information and documents (e.g., birth certificate, social security card, etc.) needed for program enrollment.

- A total of \$25,000 was awarded to work2future from the RPI 4.0 grant to the Bay-Peninsula RPU. The joint project's goal is to facilitate community conversations, engagement, and/or training on issues of race, equity, and high road principles for the purpose of promoting improved service delivery, income mobility for individuals with barriers to employment, and growth in the regional economy. This grant runs from April 1, 2021, to September 30, 2022.
- work2future was granted \$600,000 of National Dislocated Worker Grant funds to the COVID-19 Employment Recovery NDWG Project in grant code 1194. The grant is focused to provide occupational skills training to individuals affected by COVID-19. The original term of these funds is from April 10, 2020, through March 31, 2022, but was extended to March 31, 2023. As of June 30, 2022, 74% of the grant were spent.
- NOVA Workforce Development Board (lead agency), in collaboration with work2future and San Francisco Workforce Development Board, was awarded funds to structure a program under Comprehensive and Accessible Reemployment through Equitable Employment Recovery (CAREER) National Dislocated Worker Grants (DWG). work2future was allotted \$500,000 to help implement the grant. The goal of the CAREER DWG is to help reemploy dislocated workers most affected by the COVID-19 pandemic. Grants will focus on serving those from historically marginalized communities, and/or those who have been unemployed for a prolonged period or have exhausted Unemployment Insurance (UI) or other Pandemic UI programs. Regionally, the project's primary aim is to promote equity in the pursuit of high-wage, high-growth jobs by specifically focusing job training and placement opportunities on Silicon Valley's Latino and Southeast Asian communities. The term of the grant is from October 1, 2021, to September 30, 2023. work2future program implementation starts on April 1, 2022.
- work2future received \$250,000 from the State of California as one of the recipients of the Workforce Accelerator 9.0 grant. The project's primary aim is to promote equity in the pursuit of high-wage, high-growth jobs by specifically focusing job training and placement opportunities on Silicon Valley's Latino and Southeast Asian communities. Specifically, this initiative's development and assessment of multiple gateways to jobs in the advanced manufacturing sector will measure effectiveness of interventions with these specific populations. The term of the grant is from June 1, 2021, to December 31, 2022. Approximately 15% of the funds were spent as of June 30, 2022.
- NPower, a national non-profit organization that creates pathways to economic prosperity by launching digital careers for military veterans and young adults from underserved communities sub-awarded \$57,200 to work2future to help implement a project under the Veterans' Employment Related Assistance Program grants. The project named "The NPower Veteran Patriot Project" targets low-income veterans who make no more than 200% of the federal poverty level. Its aim is to co-enroll Veterans in both NPower and work2future's programs, capitalizing on WIOA eligibility and leveraging other training funds whenever possible with the goal of improving the careers and lives of local Veterans and engineer a better system to upskill underrepresented people for in-demand tech jobs. The term of the grant is from April 1, 2021, to March 31, 2023.

- California Labor and Workforce Development Agency granted work2future \$20,000 for the Library Workforce Partnership Initiative. The initiative will provide resources, training, networking, and support for public library staff in the cohort of California public libraries identified as having a partnership with workforce development boards. The goal of the collaboration between our libraries and workforce development are to meet the needs of the community and prioritize equitable access to job seekers and unemployed individuals. This effort will result in increased employment and training services and expand access to technology and technical training to job seekers that lead to good jobs and sustainable wages. The term of the grant is from November 1, 2021, to June 30, 2022. As of June 30, 2022, funds have been fully spent.
- work2future received an allocation from the City's General Fund of \$1,500,000 for San Jose Works 7.0, in addition to the carry over funding, net of adjustment of \$1,141,908 from FY 2020-21 for a total funding of \$2,641,908. For the current program year, 375 participants have been served where 336 students have completed the program. In addition to recruitment, placement, and onboarding services, youth also were also provided career counseling, job readiness training, supportive services (e.g., bus passes), and financial literacy education.
- EDPR CA Solar Park, one of renewable energy developers of the City's Community Energy Department is required to perform certain obligations related to workforce development and community investment as stated in the Renewable Power Purchase Agreement with the City of San Jose. In relation to this, EDPR agreed to contribute \$275,000 in three annual installments - \$91,667 on or before May 31, 2020, \$91,667 on or before May 31, 2021, and \$91,666 on or before May 31, 2022. The funds will be used to support the San Jose Work program aimed for participant placements in partner companies related to clean energy and sustainability. First and second rounds of funding were fully spent.
- Cities of Financial Empowerment (CFE) pledged to provide work2future \$25,000 to support a Summer Jobs Connect Program. This will provide banking access and financial empowerment training to participants in municipal Summer Youth Employment Programs. A portion of the grant will also be used to support the participant wages for the San Jose Works internship program. The grant term will begin on March 1, 2021, and end on April 30, 2022. Funds were fully spent within the grant period.
- work2future foundation awarded us \$291,917 of grants and contributions from various sources to support the San Jose Works Program. Below is the list of the funding sources and amounts.

Funding Source	Sponsorship/Contributions	Sub-grants
Bank of America	-	\$55,250
Wells Fargo	\$7,500	\$7,500
Amazon	\$100,000	-
Flagship	\$5,000	-

- BusinessOwnersSpace (BOS) and CA Workforce Development Board (CWDB) funds are unrestricted funds that have been sourced from various agencies and have been carried forward year after year until funding is fully exhausted.

- Google donated \$300,000 for moving costs, tenant site improvements, and technology upgrades to the new work2future San Jose Job Center location. The donation is in relation to Google's commitment to partner with work2future in its efforts to help Santa Clara County residents get the skills and coaching they need to find a new job, get a promotion, or start a new career and to support provision of client services at the new job center.
- Google's Downtown West Mixed-Use Plan approved by the City Council on May 25, 2021, includes a Development Agreement citing a total of \$200 million Community Benefits Payment that will be used for investments that go beyond the City's baseline requirements to address the community's top priorities. The City of San Jose has then received \$4.5 million early payment which are allocated to various programs. Out of the \$4.5 million funding, work2future will manage \$625,000 which is allotted for paid work experience and occupational skills training program. An "Earn and Learn" approach will be implemented in this program with a focus on high growth, high wage careers in advanced manufacturing, information technology, health care, or construction and trades. There is also \$600,000 that work2future will help manage to provide subsidies for participants of workforce development programs to cover childcare costs required for their participation in the program

###

Attachments

WIOA Formula Funds	Adult	Dislocated Worker	Youth	RR	TOTAL WIOA FORMULA FUNDS
<b>I. Actual as of June 30, 2021</b>					
Grant Period	07/01/20-06/30/22	07/01/20-06/30/22	07/01/20-06/30/22	07/01/20-06/30/22	
Available Funds for FY2020-2021 PD 14 Stat 3	1,882,845	1,963,174	1,981,610	633,925	6,461,554
Actual Expenditures as of June 30, 2021	(755,507)	(386,982)	(444,909)	(379,977)	(1,967,374)
Encumbrances/Spending Plan as of June 30, 2021	(35,908)	(58,016)	(30,681)	0	(124,605)
Total Actual Expenditures/Encumbrances/Spending Plan as of June 2021	(791,415)	(444,998)	(475,590)	(379,977)	(2,091,979)
Available Funds for FY2021-2022	1,091,430	1,518,176	1,506,020	253,948	4,369,575
% Remaining	58%	77%	76%	40%	68%
<b>II. Actual Expenditures/Encumbrances</b>					
(a) Available Funds from Carry over for FY2021-2022 (remaining plus enc.)	1,127,338	1,576,192	1,536,701	253,948	4,494,180
Transfer between Adult and Dislocated Worker	400,000	(400,000)	0	0	0
Expenditures as of June 30, 2022	(1,527,338)	(1,176,192)	(1,536,701)	(253,948)	(4,494,180)
Encumbrances as of June 30, 2022	0	0	0	0	0
Total Actual Expenditures/Encumbrances as of June 30, 2022	(1,527,338)	(1,176,192)	(1,536,701)	(253,948)	(4,494,180)
\$ Remaining	(0)	0	0	0	(0)
% Remaining	0%	0%	0%	0%	0%
(b) Current Allocation for FY 2021-2022	1,912,928	2,087,379	1,975,827	505,829	6,481,963
Additional Funding	0	170	0	0	170
Transfer between Adult and Dislocated Worker	559,392	(559,392)	0	0	0
Rescission	0	0	0	0	0
Adjusted Allocation for FY 2021-2022	2,472,320	1,528,157	1,975,827	505,829	6,482,133
Expenditures as of June 30, 2022	(938,673)	(285,170)	(455,272)	(144,241)	(1,823,356)
Encumbrances as of June 30, 2022	(2,921)	(2,435)	(40,625)	0	(45,981)
Total Actual Expenditures/Encumbrances as of June 30, 2022	(941,594)	(287,605)	(495,897)	(144,241)	(1,869,337)
\$ Remaining	1,530,726	1,240,552	1,479,931	361,588	4,612,796
% Remaining	62%	81%	75%	71%	71%
Total Available Funds for FY2021-2022	3,999,658	2,704,349	3,512,528	759,777	10,976,313
Total Cumulative Expenditures/Encumbrance as of June 30, 2022	(2,468,932)	(1,463,798)	(2,032,597)	(398,189)	(6,363,517)
\$ Remaining	1,530,726	1,240,552	1,479,931	361,588	4,612,796
% Remaining	38%	46%	42%	48%	42%
<b>III. Projected Expenditures/Carry Over through June 30, 2022</b>					
Actual Expenditures through June 2022	(2,466,011)	(1,461,363)	(1,991,973)	(398,189)	(6,317,536)
Actual Carry Over through June 2022 (\$)	1,533,647	1,242,987	1,520,555	361,588	4,658,777
Actual Carry Over through June 2022 (%) with Rapid Response	62%	81%	77%	71%	72%
Actual Carry Over through June 2022 (%) without Rapid Response	62%	81%	77%	71%	72%

Other Discretionary Funds	Prison To Employment Direct Service Earn and Learn (NOVA)	Prison to Employment Program Lead	Emerging Needs - Local Assistance Funds	SlingShot/Regional Plan Implementation (NOVA)	National Dislocated Worker Grant Funds to COVID-19 Employment Recovery NDWG Project	Career NDWG	Workforce Accelerator Fund 9.0	Veterans' Employment- Related Assistance	Library Workforce Partnership Initiative	Total
<b>I. Actual as of June 30, 2021</b>	<b>9/1/2019 - 3/31/2022</b>	<b>9/1/2019 - 3/31/2022</b>		<b>10/1/2021 - 9/30/2022</b>	<b>4/10/2020 - 3/31/2023</b>	<b>04/1/2022-12/31/2023</b>	<b>06/01/2021 - 12/31/2022</b>	<b>10/14/2021 - 03/31/2023</b>	<b>11/1/2021 - 6/30/2022</b>	
Grant Period	9/1/2019 - 3/31/2022	9/1/2019 - 3/31/2022		10/1/2021 - 9/30/2022	4/10/2020 - 3/31/2023	04/1/2022-12/31/2023	06/01/2021 - 12/31/2022	10/14/2021 - 03/31/2023	11/1/2021 - 6/30/2022	
Original Allocation	607,977	53,807	5,000	0	600,000	0	0	0	0	1,266,784
Increase/(Decrease)	0	0	0	0	0	0	0	0	0	0
Adjusted Allocation	607,977	53,807	5,000	0	600,000	0	0	0	0	1,266,784
Expenditures as of June 30, 2021	(438,063)	(35,641)	0	0	(106,576)	0	0	0	0	(580,280)
Encumbrance as of June 30, 2021	(62,816)	0	0	0	(25,770)	0	0	0	0	(88,586)
Total Actual Expenditures/Encumbrances as of June 2021	(500,879)	(35,641)	0	0	(132,345)	0	0	0	0	(668,866)
Available Funds for FY 2021-2022	107,098	18,166	5,000	0	467,655	0	0	0	0	597,918
% Remaining	18%	34%	100%	0%	78%	0%	0%	0%	0%	47%
<b>II. Actual Expenditures/Encumbrances</b>										
Available Funds for FY2021-2022	169,914	18,166	5,000	0	493,424	500,000	250,000	57,200	20,000	1,513,704
Funding 21-22	228,207	0	0	25,000	0	0	0	0	0	253,207
Adjustment	0	0	0	0	0	0	0	0	0	0
Total Available Funding for FY 2021-2022	398,121	18,166	5,000	25,000	493,424	500,000	250,000	57,200	20,000	1,766,911
Expenditures as of June 30, 2022	(394,795)	(18,166)	0	(768)	(334,734)	(25,816)	(36,999)	(509)	(20,000)	(831,787)
Encumbrances as of June 30, 2022	0	0	0	0	(21)	0	0	0	0	(21)
Cumulative Expenditures/Encumbrances as of June 30, 2022	(394,795)	(18,166)	0	(768)	(334,755)	(25,816)	(36,999)	(509)	(20,000)	(831,808)
Remaining	3,326	0	5,000	24,232	158,670	474,184	213,001	56,691	0	935,103
% Remaining	1%	0%	100%	97%	32%	95%	85%	99%	0%	53%
<b>III. Projected Expenditures/Carry Over</b>										
Actual Expenditures through June 2022	(394,795)	(18,166)	0	(768)	(334,734)	(25,816)	(36,999)	(509)	(20,000)	(831,787)
Actual Carry Over through June 2022 (\$)	0	0	5,000	24,232	158,691	474,184	213,001	56,691	0	931,798
Actual Carry Over through June 2022 (%)	0%	0%	100%	97%	32%	95%	85%	99%	0%	53%

Other Discretionary Funds	City of San Jose Youth Summer Program Initiative	San Jose Works (EDP Renewables)	San Jose Works (CFE) NEW GRANT	w2ff - San Jose Works (Bank of America) NEW GRANT	w2ff - San Jose Works (Wells Fargo) NEW GRANT	w2ff - San Jose Works (Amazon) Contribution	w2ff - San Jose Works (Flagship) Contribution	Total
<b>I. Actual as of June 30, 2021</b>	<b>04/30/2021 - 4/30/2022</b>	<b>Execution - 5/31/2023</b>	<b>Execution - 4/30/2022</b>	<b>Execution - 6/30/2022</b>	<b>Execution - 6/30/2022</b>	<b>N/A</b>	<b>N/A</b>	
Original Allocation	1,500,000	275,000	0	0	0	0	0	1,775,000
Increase/(Decrease)	1,148,527	0	0	0	0	0	0	1,148,527
Adjusted Allocation	2,648,527	275,000	0	0	0	0	0	2,923,527
Expenditures as of June 30, 2021	(943,779)	(91,667)	0	0	0	0	0	(1,035,446)
Encumbrance as of June 30, 2021	(1,141,908)	0	0	0	0	0	0	(1,141,908)
Total Actual Expenditures/Encumbrances as of June 2021	(2,085,686)	(91,667)	0	0	0	0	0	(2,177,353)
Available Funds for FY 2021-2022	562,841	183,333	0	0	0	0	0	746,174
% Remaining	21%	67%	0%	0%	0%	0%	0%	26%
<b>II. Actual Expenditures/Encumbrances</b>								
Available Funds for FY2021-2022	1,141,908	183,333	0	0	0	0	0	1,325,241
Funding 21-22	1,500,000	0	25,000	55,250	15,000	100,000	5,000	1,700,250
Adjustment	0	0	0	0	0	0	0	0
Total Available Funding for FY 2021-2022	2,641,908	183,333	25,000	55,250	15,000	100,000	5,000	3,025,491
Expenditures as of June 30, 2022	(1,505,554)	(91,667)	(25,000)	(55,250)	(7,500)	0	0	(1,684,971)
Encumbrances as of June 30, 2022	(1,035,070)	0	0	0	0	0	0	(1,035,070)
Cumulative Expenditures/Encumbrances as of June 30, 2022	(2,540,624)	(91,667)	(25,000)	(55,250)	(7,500)	0	0	(2,720,041)
Remaining	101,284	91,666	0	0	7,500	100,000	5,000	305,450
% Remaining	4%	50%	0%	0%	50%	100%	100%	10%
<b>III. Projected Expenditures/Carry Over</b>								
Actual Expenditures through June 2022	(1,505,554)	(91,667)	(25,000)	(55,250)	(7,500)	0	0	(1,684,971)
Actual Carry Over through June 2022 (\$)	1,035,070	91,666	0	0	7,500	100,000	5,000	1,239,236
Actual Carry Over through June 2022 (%)	39%	50%	0%	0%	50%	100%	100%	41%

work2future

Preliminary Financial Status Report as of 06/30/2022

PD 14 Status 3

Other Funds	CWDB	BOS	Total
<b>I. Actual as of June 30, 2021</b>			
<b>Grant Period</b>	<b>N/A</b>	<b>N/A</b>	
<b>Original Allocation</b>	<b>5,000</b>	<b>15,454</b>	<b>20,454</b>
Expenditure/Encumbrances as of June 2021	(958)	(6,554)	(7,512)
<i>Total Actual Expenditures/Encumbrances as of June 2021</i>	(958)	(6,554)	(7,512)
<b>Available Funds for FY 2021-2022</b>	<b>4,042</b>	<b>8,900</b>	<b>12,942</b>
<b>% Remaining</b>	<b>81%</b>	<b>58%</b>	<b>63%</b>
<b>II. Actual Expenditures/Encumbrances</b>			
Available Funds for FY 2021-2022	<b>4,042</b>	<b>8,900</b>	<b>12,942</b>
<i>Expenditures as of June 30, 2022</i>	0	(1,062)	(1,062)
<i>Encumbrances as of June 30, 2022</i>	0	0	0
<b>Cumulative Expenditures as of June 30, 2022</b>	0	(1,062)	(1,062)
<b>\$ Remaining</b>	<b>4,042</b>	<b>7,838</b>	<b>11,880</b>
<b>% Remaining</b>	<b>100%</b>	<b>88%</b>	<b>92%</b>
<b>III. Projected Expenditures/Carry Over</b>			
<b>Actual Carry Over through June 2022</b>	<b>4,042</b>	<b>7,838</b>	<b>11,880</b>
<b>Actual Carry Over (%) through June 2022</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>



work2future  
Preliminary Financial Status Report as of 06/30/2022  
PD 14 Status 3

Other Funds	Google work2future Relocation	Google WEX and Training	Google Child Care	Total
<b>I. Actual as of June 30, 2021</b>				
<b>Grant Period</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	
<b>Original Allocation</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Expenditure/Encumbrances as of June 2021	0	0	0	0
Total Actual Expenditures/Encumbrances as of June 2021	0	0	0	0
<b>Available Funds for FY 2021-2022</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>% Remaining</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
<b>II. Actual Expenditures/Encumbrances</b>				
Available Funds for FY 2021-2022	<b>300,000</b>	<b>625,000</b>	<b>600,000</b>	<b>1,525,000</b>
Expenditures as of June 30, 2022	(75,749)	0	0	(75,749)
Encumbrances as of June 30, 2022	(700)			(700)
<b>Cumulative Expenditures as of June 30, 2022</b>	<b>(76,449)</b>	<b>0</b>	<b>0</b>	<b>(76,449)</b>
<b>\$ Remaining</b>	<b>223,551</b>	<b>625,000</b>	<b>600,000</b>	<b>1,448,551</b>
<b>% Remaining</b>	<b>75%</b>	<b>100%</b>	<b>100%</b>	<b>95%</b>
<b>III. Projected Expenditures/Carry Over</b>				
<b>Actual Carry Over through June 2022</b>	<b>223,551</b>	<b>625,000</b>	<b>600,000</b>	<b>1,448,551</b>
<b>Actual Carry Over (%) through June 2022</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

## **PRELIMINARY FINANCIAL STATUS AS OF JULY 31, 2022**

### **Key Highlights**

- WIOA PY21-22 formula and PY22-23 Rapid Response funding is projected to be fully spent by June 30, 2023.
- For the PY21-22 Rapid Response funding carry-over that was extended by the State to spend by September 30, 2022, approximately \$200,000 of the \$361,588 will be spent.
- As of July 31, 2022, work2future has \$2.09 million from the current Adult, Dislocated Worker, and Youth allocations to be carried over to FY 2023-24 representing:
  1. Board-mandated Reserve Account: \$1,053,521
  2. Unallocated Reserve Account: \$1,021,293
  3. Projected savings of \$17,836 which comprised of the following:
    - a. Savings from personnel costs for vacancies: \$77,836
    - b. Unanticipated security services cost: (\$60,000)

### **Other Discretionary Funding**

- work2future received \$5,000 from the City of San Jose to assist WIOA clients in gathering information and documents (e.g., birth certificate, social security card, etc.) needed for program enrollment.
- A total of \$25,000 was awarded to work2future from the RPI 4.0 grant to the Bay-Peninsula RPU. The joint project's goal is to facilitate community conversations, engagement, and/or training on issues of race, equity, and high road principles for the purpose of promoting improved service delivery, income mobility for individuals with barriers to employment, and growth in the regional economy. This grant runs from April 1, 2021, to September 30, 2022.
- work2future was granted \$600,000 of National Dislocated Worker Grant funds to the COVID-19 Employment Recovery NDWG Project in grant code 1194. The grant is focused to provide occupational skills training to individuals affected by COVID-19. The original term of these funds is from April 10, 2020, through March 31, 2022, but was extended to March 31, 2023. As of July 31, 2022, 74% of the grant were spent.
- NOVA Workforce Development Board (lead agency), in collaboration with work2future and San Francisco Workforce Development Board, was awarded funds to structure a program under Comprehensive and Accessible Reemployment through Equitable Employment Recovery (CAREER) National Dislocated Worker Grants (DWG). work2future was allotted \$500,000 to help implement the grant. The goal of the CAREER DWG is to help reemploy dislocated workers most affected by the COVID-19 pandemic. Grants will focus on serving those from historically marginalized communities, and/or those who have been unemployed for a prolonged period or have exhausted Unemployment Insurance (UI) or other Pandemic UI programs. Regionally, the project's primary aim is to promote equity in the pursuit of high-wage, high-growth jobs by specifically focusing job training and placement opportunities on Silicon Valley's Latino and Southeast Asian communities. The term of the

grant is from October 1, 2021, to September 30, 2023. work2future program implementation starts on April 1, 2022. As of July 31, 2022, approximately 6% of the funds were spent.

- work2future received \$250,000 from the State of California as one of the recipients of the Workforce Accelerator 9.0 grant. The project's primary aim is to promote equity in the pursuit of high-wage, high-growth jobs by specifically focusing job training and placement opportunities on Silicon Valley's Latino and Southeast Asian communities. Specifically, this initiative's development and assessment of multiple gateways to jobs in the advanced manufacturing sector will measure effectiveness of interventions with these specific populations. Original term of the grant is from June 1, 2021, to December 31, 2022, but was extended to March 31, 2023. Approximately 19% of the funds were spent as of July 31, 2022.
- NPower, a national a national non-profit organization that creates pathways to economic prosperity by launching digital careers for military veterans and young adults from underserved communities sub-awarded \$57,200 to work2future to help implement a project under the Veterans' Employment Related Assistance Program grants. The project named "The NPower Veteran Patriot Project" targets low-income veterans who make no more than 200% of the federal poverty level. Its aim is to co-enroll Veterans in both NPower and work2future's programs, capitalizing on WIOA eligibility and leveraging other training funds whenever possible with the goal of improving the careers and lives of local Veterans and engineer a better system to upskill underrepresented people for in-demand tech jobs. The term of the grant is from April 1, 2021, to March 31, 2023. As of July 31, 2022, approximately 6% of the funds were spent.
- work2future received an allocation from the City's General Fund of \$1,647,000 for San Jose Works 8.0, in addition to the carry over funding, net of adjustment of \$1,035,070 from FY 2021-22 for a total funding of \$2,682,070. As of July 31, 2022, 376 participants have been served where 350 students are expected to complete the program. In addition to recruitment, placement, and onboarding services, youth also were also provided career counseling, job readiness training, supportive services (e.g., bus passes), and financial literacy education.
- EDPR CA Solar Park, one of renewable energy developers of the City's Community Energy Department is required to perform certain obligations related to workforce development and community investment as stated in the Renewable Power Purchase Agreement with the City of San Jose. In relation to this, EDPR agreed to contribute \$275,000 in three annual installments - \$91,667 on or before May 31, 2020, \$91,667 on or before May 31, 2021, and \$91,666 on or before May 31, 2022. The funds will be used to support the San Jose Work program aimed for participant placements in partner companies related to clean energy and sustainability. First and second rounds of funding were fully spent.
- Cities of Financial Empowerment (CFE) pledged to provide work2future \$30,000 to support a Summer Jobs Connect Program. This will provide banking access and financial empowerment training to participants in municipal Summer Youth Employment Programs. A portion of the grant will also be used to support the participant wages for the San Jose Works internship program. The grant term will begin on May 1, 2022, and end on April 30, 2023. Funds were fully spent within the grant period. As of July 31, 2022, 15% of funds are spent. It is expected that money will be fully spent before the term end date.

- work2future foundation awarded us \$197,400 of grants and contributions from various sources to support the San Jose Works Program. Below is the list of the funding sources and amounts.

Funding Source	Sponsorship/Contributions	Sub-grants
Bank of America	-	\$84,900
Wells Fargo	\$7,500	-
Amazon	\$100,000	-
Flagship	\$5,000	-

- BusinessOwnersSpace (BOS) and CA Workforce Development Board (CWDB) funds are unrestricted funds that have been sourced from various agencies and have been carried forward year after year until funding is fully exhausted.
- Google donated \$300,000 for moving costs, tenant site improvements, and technology upgrades to the new work2future San Jose Job Center location. The donation is in relation to Google's commitment to partner with work2future in its efforts to help Santa Clara County residents get the skills and coaching they need to find a new job, get a promotion, or start a new career and to support provision of client services at the new job center.
- Google's Downtown West Mixed-Use Plan approved by the City Council on May 25, 2021, includes a Development Agreement citing a total of \$200 million Community Benefits Payment that will be used for investments that go beyond the City's baseline requirements to address the community's top priorities. The City of San Jose has then received \$4.5 million early payment which are allocated to various programs. Out of the \$4.5 million funding, work2future will manage \$625,000 which is allotted for paid work experience and occupational skills training program. An "Earn and Learn" approach will be implemented in this program with a focus on high growth, high wage careers in advanced manufacturing, information technology, health care, or construction and trades. There is also \$600,000 that work2future will help manage to provide subsidies for participants of workforce development programs to cover childcare costs required for their participation in the program

###

Attachments

WIOA Formula Funds	Adult	Dislocated Worker	Youth	RR	TOTAL WIOA FORMULA FUNDS
<b>I. Actual as of June 30, 2022</b>					
Grant Period	07/01/21-06/30/23	07/01/21-06/30/23	07/01/21-06/30/23	07/01/21-06/30/23	
Available Funds for FY2021-2022 PD 14 Stat 3	2,472,320	1,528,157	1,975,827	505,829	6,482,133
Actual Expenditures as of June 30, 2022	(938,673)	(285,170)	(455,272)	(144,241)	(1,823,356)
Encumbrances/Spending Plan as of June 30, 2022	(2,921)	(2,435)	(40,625)	0	(45,981)
Total Actual Expenditures/Encumbrances/Spending Plan as of June 2022	(941,594)	(287,605)	(495,897)	(144,241)	(1,869,337)
Available Funds for FY2022-2023	1,530,726	1,240,552	1,479,931	361,588	4,612,796
% Remaining	62%	81%	75%	71%	71%
<b>II. Actual Expenditures/Encumbrances</b>					
(a) Available Funds from FY2021-2022 Carry over for FY2022-2023 (remaining plus enc.	1,533,647	1,242,987	1,520,555	361,588	4,658,777
Transfer between Adult and Dislocated Worker	0	0	0	0	0
Expenditures as of July 31, 2022	(142,502)	(101,039)	(226,330)	(24,645)	(494,516)
Encumbrances as of July 31, 2022	(36,817)	(38,536)	(79,679)	0	(155,031)
Total Actual Expenditures/Encumbrances as of July 31, 2022	(179,319)	(139,575)	(306,008)	(24,645)	(649,547)
\$ Remaining	1,354,328	1,103,412	1,214,547	336,942	4,009,230
% Remaining	88%	89%	80%	93%	86%
<b>(b) Current Allocation for FY 2022-2023</b>	2,181,118	2,586,974	2,255,378	512,371	7,535,841
Additional Funding	0	0	0	0	0
Transfer between Adult and Dislocated Worker	0	0	0	0	0
Rescission	0	0	0	0	0
Adjusted Allocation for FY 2022-2023	2,181,118	2,586,974	2,255,378	512,371	7,535,841
Expenditures as of July 31, 2022	0	(37,076)	0	(9,882)	(46,958)
Encumbrances as of July 31, 2022	0	0	0	0	0
Total Actual Expenditures/Encumbrances as of July 31, 2022	0	(37,076)	0	(9,882)	(46,958)
\$ Remaining	2,181,118	2,549,898	2,255,378	502,489	7,488,883
% Remaining	100%	99%	100%	98%	99%
<b>Total Available Funds for FY2022-2023</b>	3,714,765	3,829,961	3,775,933	873,959	12,194,618
Total Cumulative Expenditures/Encumbrance as of July 31, 2022	(179,319)	(176,651)	(306,008)	(34,527)	(696,506)
\$ Remaining	3,535,446	3,653,310	3,469,925	839,432	11,498,113
% Remaining	95%	95%	92%	96%	94%
<b>III. Projected Expenditures/Carry Over through June 30, 2023</b>					
Projected Expenditures through June 2023	(3,076,130)	(2,786,969)	(2,895,040)	(849,313)	(9,607,452)
Projected Carry Over through June 2023 (\$)	496,133	941,953	654,564	0	2,092,650
Projected Carry Over through June 2023 (%) with Rapid Response	23%	36%	29%	0%	28%
Projected Carry Over through June 2023 (%) without Rapid Response	23%	36%	29%	0%	30%

Other Discretionary Funds	Emerging Needs - Local Assistance Funds	SlingShot/Regional Plan Implementation (NOVA)	National Dislocated Worker Grant Funds to COVID-19 Employment Recovery NDWG Project	Career NDWG	Workforce Accelerator Fund 9.0	Veterans' Employment-Related Assistance	Total
<b>I. Actual as of June 30, 2022</b>							
<b>Grant Period</b>		<b>10/1/2021 - 9/30/2022</b>	<b>4/10/2020 - 3/31/2023</b>	<b>04/1/2022- 12/31/2023</b>	<b>06/01/2021 - 03/31/2023</b>	<b>10/14/2021 - 03/31/2023</b>	
Original Allocation/Available Funds for FY21-22	5,000	25,000	493,424	500,000	250,000	57,200	1,330,624
Increase/(Decrease)	0	0	0	0	0	0	0
Adjusted Allocation	5,000	25,000	493,424	500,000	250,000	57,200	1,330,624
Expenditures as of June 30, 2022	0	(768)	(334,734)	(25,816)	(36,999)	(509)	(398,827)
Encumbrance as of June 30, 2022	0	0	(21)	0	0	0	(21)
Total Actual Expenditures/Encumbrances as of June 2022	0	(768)	(334,755)	(25,816)	(36,999)	(509)	(398,848)
Available Funds for FY 2022-2023	5,000	24,232	158,669	474,184	213,001	56,691	931,776
% Remaining	100%	97%	32%	95%	85%	99%	70%
<b>II. Actual Expenditures/Encumbrances</b>							
Available Funds for FY2022-2023	5,000	24,232	158,690	474,184	213,001	56,691	931,797
Funding 22-23	0	0	0	0	0	0	0
Adjustment	0	0	0	0	0	0	0
Total Available Funding for FY 2021-2022	5,000	24,232	158,690	474,184	213,001	56,691	931,797
Expenditures as of July 31, 2022	0	0	(4,515)	(5,393)	(10,625)	(2,639)	(23,173)
Encumbrances as of July 31, 2022	0	0	(9,913)	0	0	0	(9,913)
Cumulative Expenditures/Encumbrances as of July 31, 2022	0	0	(14,427)	(5,393)	(10,625)	(2,639)	(33,085)
Remaining	5,000	24,232	144,263	468,790	202,375	54,052	898,712
% Remaining	100%	100%	91%	99%	95%	95%	96%
<b>III. Projected Expenditures/Carry Over</b>							
Projected Expenditures through June 2023	0	0	(158,690)	(316,122)	(213,001)	(56,691)	(744,504)
Projected Carry Over through June 2023 (\$)	5,000	0	0	158,062	(0)	(0)	163,061
Projected Carry Over through June 2023 (%)	100%	0%	0%	33%	0%	0%	17%

Other Discretionary Funds	City of San Jose Youth Summer Program Initiative	San Jose Works (EDP Renewables)	San Jose Works (CFE)	w2ff - San Jose Works (Bank of America)	w2ff - San Jose Works (Wells Fargo)	w2ff - San Jose Works (Amazon)	w2ff - San Jose Works (Flagship)	Total
<b>I. Actual as of June 30, 2022</b>								
Grant Period	04/30/2022 - 4/30/2023	Execution - 5/31/2023	Execution - 4/30/2023	Execution - 6/30/2023	N/A	N/A	N/A	
Original Allocation/Available Funds for FY21-22	1,141,908	183,333	25,000	55,250	15,000	100,000	5,000	1,525,491
Increase/(Decrease)	1,500,000	0	0	0	0	0	0	1,500,000
Adjusted Allocation	2,641,908	183,333	25,000	55,250	15,000	100,000	5,000	3,025,491
Expenditures as of June 30, 2022	(1,505,554)	(91,667)	(25,000)	(55,250)	(7,500)	0	0	(1,684,971)
Encumbrance as of June 30, 2022	(1,035,070)	0	0	0	0	0	0	(1,035,070)
<b>Total Actual Expenditures/Encumbrances as of June 2022</b>	<b>(2,540,624)</b>	<b>(91,667)</b>	<b>(25,000)</b>	<b>(55,250)</b>	<b>(7,500)</b>	<b>0</b>	<b>0</b>	<b>(2,720,041)</b>
Available Funds for FY 2022-2023	101,284	91,666	0	0	7,500	100,000	5,000	305,450
% Remaining	4%	50%	0%	0%	50%	100%	100%	10%
<b>II. Actual Expenditures/Encumbrances</b>								
Available Funds for FY2022-2023	1,035,070	91,666	0	0	7,500	100,000	5,000	1,239,236
Funding 22-23	1,647,000	0	30,000	84,900	0	0	0	1,761,900
Adjustment	0	0	0	0	0	0	0	0
Total Available Funding for FY 2022-2023	2,682,070	91,666	30,000	84,900	7,500	100,000	5,000	3,001,136
Expenditures as of July 31, 2022	(130,900)	0	(4,432)	0	(7,500)	0	0	(142,832)
Encumbrances as of July 31, 2022	(951,349)	0	0	0	0	0	0	(951,349)
<b>Cumulative Expenditures/Encumbrances as of July 31, 2022</b>	<b>(1,082,248)</b>	<b>0</b>	<b>(4,432)</b>	<b>0</b>	<b>(7,500)</b>	<b>0</b>	<b>0</b>	<b>(1,094,181)</b>
Remaining	1,599,822	91,666	25,568	84,900	0	100,000	5,000	1,906,955
% Remaining	60%	100%	85%	100%	0%	100%	100%	64%
<b>III. Projected Expenditures/Carry Over</b>								
Projected Expenditures through June 2023	(2,011,033)	(91,666)	(30,000)	(84,900)	0	0	0	(2,217,599)
Projected Carry Over through June 2023 (\$)	671,037	0	0	0	7,500	100,000	5,000	783,537
Projected Carry Over through June 2023 (%)	25%	0%	0%	0%	100%	100%	100%	26%

work2future

Preliminary Financial Status Report as of 07/31/2022

PD 1 Status 3

Other Funds	CWDB	BOS	Total
<b>I. Actual as of June 30, 2022</b>			
Grant Period	N/A	N/A	
Original Allocation/Available Funds for FY21-22	4,042	8,900	12,942
Expenditure/Encumbrances as of June 2022	0	(1,062)	(1,062)
Total Actual Expenditures/Encumbrances as of June 2022	0	(1,062)	(1,062)
Available Funds for FY 2022-2023	4,042	7,838	11,880
% Remaining	100%	88%	92%
<b>II. Actual Expenditures/Encumbrances</b>			
Available Funds for FY 2022-2023	4,042	7,838	11,880
Expenditures as of July 31, 2022	0	0	0
Encumbrances as of July 31, 2022	0	0	0
Cumulative Expenditures as of July 31, 2022	0	0	0
\$ Remaining	4,042	7,838	11,880
% Remaining	100%	100%	100%
<b>III. Projected Expenditures/Carry Over</b>			
Projected Carry Over through June 2023	4,042	7,838	11,880
Projected Carry Over (%) through June 2023	100%	100%	100%



work2future  
Preliminary Financial Status Report as of 07/01/2022  
PD 1 Status 3

Other Funds	Google	Google	Google	Total
<b>I. Actual as of June 30, 2022</b>	work2future Relocation	WEX and Training	Child Care	
<b>Grant Period</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	
<b>Original Allocation/Available Funds for FY21-22</b>	<b>300,000</b>	<b>625,000</b>	<b>600,000</b>	<b>1,525,000</b>
Expenditure/Encumbrances as of June 2022	(75,749)	0	0	(75,749)
Encumbrance	(700)	0	0	(700)
<i>Total Actual Expenditures/Encumbrances as of June 2022</i>	<i>(76,449)</i>	<i>0</i>	<i>0</i>	<i>(76,449)</i>
<b>Available Funds for FY 2022-2023</b>	<b>223,551</b>	<b>625,000</b>	<b>600,000</b>	<b>1,448,551</b>
<b>% Remaining</b>	<b>75%</b>	<b>100%</b>	<b>100%</b>	<b>95%</b>
<b>II. Actual Expenditures/Encumbrances</b>				
Available Funds for FY 2021-2022	<b>224,251</b>	<b>625,000</b>	<b>600,000</b>	<b>1,449,251</b>
<i>Expenditures as of July 31, 2022</i>	<i>(2,151)</i>	<i>0</i>	<i>0</i>	<i>(2,151)</i>
<i>Encumbrances as of July 31, 2022</i>	<i>(700)</i>	<i>0</i>	<i>0</i>	<i>(700)</i>
<b>Cumulative Expenditures as of July 31, 2022</b>	<b>(2,851)</b>	<b>0</b>	<b>0</b>	<b>(2,851)</b>
<b>\$ Remaining</b>	<b>221,400</b>	<b>625,000</b>	<b>600,000</b>	<b>1,446,400</b>
<b>% Remaining</b>	<b>99%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>III. Projected Expenditures/Carry Over</b>				
<b>Projected Carry Over through June 2023</b>	<b>221,400</b>	<b>625,000</b>	<b>600,000</b>	<b>1,446,400</b>
<b>Projected Carry Over (%) through June 2023</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

## **SAN JOSE WORKS REPORT AS OF JUNE 30, 2022**

San Jose Works (SJ Works) is a City of San Jose-funded partnership between work2future and the City's Parks, Recreation, and Neighborhood Services Department (PRNS). SJ Works has two tracks, (i) subsidized, in which the City covers the cost of stipends or wages for youth internships/jobs, and (ii) unsubsidized, in which employers cover the cost of stipends or wages.

### **SJ Works SUBSIDIZED program 8.0 has provided:**

To date, 376 subsidized employment opportunities for youth aged 14–18 who began orientation on June 21, 2022. Youth will have June 22–August 12, 2022, to complete 120 hours.

- Youth were recruited from High School Career Technical Education classes focusing on the priority sectors and related in-demand occupations.
- Of the 376 participants, 100% of placed youth successfully completed onboarding, attended orientation, and training which includes Soft Skills, emotional intelligence, financial literacy, career exploration, entrepreneurship, and mentoring.
- The subsidized model focused increasingly on Priority-Sector and In-Demand Occupation internships for high school youth.
- Of the 376 subsidized placements, 142 were in priority sectors—information and communications technology, health care, construction, advanced manufacturing, and business and finance—or in-demand occupations outside those sectors.
- The remaining 234 subsidized placements were with community centers, libraries, City departments and Council offices, or with nonprofit agencies.
- About 95% of the internship positions were in person or a hybrid of virtual.
- In addition, 52 mentors and 58 mentees were matched and will participate in our one-on-one mentoring and group sessions.
- Alumni group of mentees and mentors continue to meet once a month
- Mentors recruited from different companies such as Western Digital, BofA, HPE, Intel, City departments, Boys & Girls Club, and others.

### **SJ Works UNSUBSIDIZED program 8.0 has provided:**

Staff have continued to work on the Unsubsidized component of SJ Works 8.0 during the pandemic. Currently, there are 147 enrollments, of which 47 are placements.

While the rest of the clients have received a service or multiple services such as assistance in job searching, job applications, resume, financial literacy workshop, mock interview, or attended a job fair or interview.

Additional services provided to participating youth in both subsidized and unsubsidized components included career counseling, job readiness workshops, supportive services (e.g., bus passes), and financial education.

- Participating youth will continue to have access to services such as job counseling, job readiness training, supportive services (e.g., transportation, clothing, etc.) and financial education.

- Program goal will remain the same of 375. If budget permits, we can increase the number of students served
- SJ Works summer youth and worksite recruitment has also begun.
- Summer program will begin June 21st and will run till August 2022
  - Participants will receive \$17.35 per hour and will receive a total of 120 hours to complete in 6-8 weeks
  - Program continues to recruit for more mentors

Interest form and flyer have been created and shared on Mayor's social media platforms

# # #

Report prepared: *Ruby Carrasco, San Jose Works Program Manager*

## WORKFORCE DEVELOPMENT BOARD

June 16, 2022

### MINUTES

Staff: Melchor, Mallari, Thoo, Walter

Guest: Sead Eminovic, International Rescue Committee (IRC), San Jose Director

NOTE: All votes were by roll call, unless otherwise indicated.

#### I. CALL TO ORDER & ROLL CALL

The meeting via Zoom Webinar was called to order at 9:32 am by Chairperson Sue Koepp-Baker.

##### Roll Call

Present: Auerhahn, Batra (arrived 9:49am), Bojorquez, Estill, Flynn (arrived 10:10am), Gutierrez, Koepp-Baker, Le, Lucero, McGrath (away 10:15-10:43am), Perez, Smith, Teixeira (arrived 9:37am), Vujjani

Absent: Chao, Gilroy, Moreno, Preminger, Takahashi

#### II. CONSENT ITEMS

**ACTION:** Mr. Estill moved, Mr. Bojorquez seconded, and the Board unanimously approved the acceptance of:

- A. Financial Status Report as of April 30, 2022
- B. San Jose Works Report as of March 31, 2022
- C. Minutes of March 17, 2022 meeting

#### III. OPEN FORUM

Ms. Koepp-Baker opened the floor for public comment. There were none.

#### IV. BUSINESS ITEMS

##### A. Director's Report

Director Monique Melchor updated the Board on recent in-person events, highlighting two scheduled job fairs – a Business Services event on June 23, 2022 and a San Jose Works event on July 26, 2022 – as well as plans for a large youth-focused job fair planned for Fall 2022. Ms. Melchor touted the success of the recent Facebook Initiative with 30+ youth participants as well as the work of the Bay Area Transition Aged Youth Technical Assistance Initiative in partnership with the NOVA, Alameda and San Francisco Workforce Development Boards. She shared that new partners are coming to the Las Plumas Avenue location including Prosperity Labs and the Latino Business Foundation. Ms. Melchor announced a partnership with West Valley Community College to offer several credentialed classes free to the public, available to WIOA and non-WIOA participants. Ms. Melchor also announced the hiring of a new Outreach Specialist focused on bringing people into the Las Plumas Avenue location for support services.

**B. WIOA Performance Report for Q2 of PY 2021**

Director Monique Melchor and Sead Eminovic, IRC San Jose Director, International Rescue Committee reported on Workforce Innovation and Opportunity Act (WIOA) program performance for the third quarter of Program Year 2021-22 (PY 2021). Ms. Melchor noted that both Adult and Dislocated Worker (A/DW) and Youth enrollments were on track with an expectation of meeting performance goals. Mr. Eminovic discussed efforts to improve Youth enrollment numbers. Brief discussion ensued among Board members.

**C. FY 2022-23 WIOA Budget**

Finance Manager Mallari presented a proposed work2future Workforce Innovation & Opportunity Act (WIOA) Program operating budget for FY 2022-2023. He highlighted EDD's planned allocations for work2future reflecting an 18% overall increase from FY21-22 funding and the resulting proposed budget for FY22-23. Mr. Mallari talked through the proposed funding sources as well as allocation of funds between various budget line items, including SB 734 Training Allocations, WIOA Youth Job Readiness/Work Experience Training Programs, WIOA Administrative Budget, WIOA Rapid Response Funding, and work2future Service Provider Funding Distributions. Brief discussion ensued among Board members.

**ACTION:** On a motion by Ms. Auerhahn, seconded by Mr. Estill, the Board voted unanimously for approval.

**D. San Jose Works 2022-23**

Finance Manager Allain Mallari presented a funding report for the San Jose Works 8.0 program, including program background and analysis and a projected 2022-2023 budget. Brief discussion ensued among Board members.

**ACTION:** On a motion by Mr. Flynn, seconded by Ms. Smith, the Board voted unanimously to approve the recommendation.

**E. Community Youth Forum Recommendations**

Board Member Jack Estill gave a report on the activity of the Community Youth Forum, including meetings with more than 30 organizations and 50 individuals. Mr. Estill invited a representative of the youth community, Maria Vans, to share her experience working with the Youth Liberation Movement and the Community Youth Forum. Ms. Vans shared personal experiences and reported survey results indicating housing, mental health and staffing are key issues for youth communities. Brief discussion ensued among the Board members. In response to a question about line item IV.E.3 (support and education for young leaders), Mr. Estill indicated that he plans to provide a report around similar efforts by the San Diego Workforce Development Board and their work in this area at the next meeting. Chairperson Koepp-Baker noted that four public letters were received in support of an ongoing Youth Committee. One public comment was shared.

**ACTION:** On a motion by Mr. Bojorquez, seconded by Ms. Lucero, the Board voted unanimously to approve the recommendation.

**F. Ad Hoc RFP Committee**

Board Member Chad Bojorquez indicated the Committee is wrapping up a series of information gathering meetings and expects to provide recommendations regarding work2future's Request for Proposals (RFP) process to the larger Board in future meetings.

## **G. Labor Market Information**

Strategic Engagement Manager Thoo reported on the status of the labor market in Santa Clara County and the San Jose-Sunnyvale-Santa Clara Metropolitan Statistical Area (MSA). He noted that the unemployment rate continues its downward trend; for Santa Clara County the rate was 2.1% in April 2022, marking the lowest unemployment rate since the beginning of the pandemic. Mr. Thoo also pointed out that the total number of employed persons in Santa Clara County has decreased by approximately 7500, indicating a reduction in labor market participation. He highlighted year-over-year employment increases within the MSA in several sectors: leisure and hospitality, professional and business services, educational and health services, manufacturing, information, transportation and utilities, and construction.

Mr. Thoo discussed a nationwide trend showing a gap in the labor force – 5.5 million unemployed workers coupled with 11.4 million job openings – and noted future concerns for workforce boards around an aging workforce with high retirement rates, as well as a lack of and the high cost of reliable childcare. Mr. Thoo also pointed out a decline in the MSA/County population as compared to national population rates. Within Santa Clara County, Mr. Thoo demonstrated that labor gap numbers follow a similar trend with approximately half as many job seekers as job postings, but also noted that hiring is complicated by a mismatch between required skill sets and available talent. Mr. Thoo pointed out that several demographics are underrepresented within the in-demand quality occupation categories identified by work2future. Mr. Thoo discussed current inflation concerns, recent moves by the Federal Reserve, and recession fears. He noted a readjustment in the County's living wage rate, resulting in a recalculation of the base wage that work2future will consider for in-demand quality occupations to \$26.96 per hour.

Brief discussion followed among the Board members.

## **V. OTHER**

Announcements, suggested agenda items for a future meeting, other housekeeping

- A.** Mr. Thoo reminded work2future Board members that in-person Board and Committee meetings are anticipated to resume in July 2022, pending an update from the Governor's office.

## **VI. ADJOURNMENT**

Meeting adjourned at 11:10 am.

# **III**

## **Open Forum**

## **IV.A**

# **Director's Report**

**[Information]**



## **DIRECTOR'S REPORT**

Director Monique Melchor will report on various matters of interest.

###

## **IV.B**

# **WIOA Performance Report for Q4 of PY 2021**

**[Information]**

**WIOA Performance Report for Q4 of PY 2021**

Staff will provide a preliminary performance report on the WIOA (Workforce Opportunity and Innovation Act) Adult, Dislocated Worker and Youth Programs as of June 30, 2022, the end of the fourth quarter of Program Year 2021–22.

###

## **IV.C**

# **Amendments to Article VI of the work2future By-laws**

**[Discussion]**

## AMENDMENTS TO ARTICLE VI OF THE WORK2FUTURE BY-LAWS

At its regular meeting on June 16, 2022, the Board accepted three recommendations from the Community Youth Forum to which Board members Jack Estill and Susan Koepp-Baker had been designated as representatives of the Board. The first of the recommendations was that “the Board should re-establish an ongoing Youth Committee to help guide the delivery of WIOA youth services and to act as a community convenor of youth-supporting organizations throughout our community as outlined in current WIOA regulations.”

At the August 18, 2022, meeting of the Executive Committee, Strategic Engagement Manager Lawrence Thoo reported that Article VI of the By-Laws stipulate that “there shall be two standing committees,” namely, the Executive Committee and the Business Services Committee. While “there shall be two standing committees” might be interpreted to mean that there must be at least two standing committees, rather than there can be only two standing committees, Mr. Thoo recommended that the By-Laws be amended to remove any ambiguity on the matter.

At the August 18, 2022, meeting, the Executive Committee voted unanimously to “direct staff to prepare and present at the earliest opportunity for the Board’s consideration and approval such amendments to Article VI (Committees) of the By-laws that will enable the formation of a Youth Committee as a standing committee of the Board.”

The attached changes to Article VI would empower the Board to establish, by resolution, standing committees in addition to the Executive Committee and the Business Services Committee, the latter of which is required under WIOA.

The proposed amendment(s) would charge the Board, in a resolution to establish a standing committee, to stipulate the committee’s responsibility or purpose and duties, the committee’s makeup, and the manner and process by which committee members are appointed.

Article IX of the By-Laws stipulates that a majority of the Board’s members must vote to approve By-Laws amendments after the amendments proposed “have been submitted in writing at the previous regular meeting or included in the call to the meeting.” As the proposed amendments to Article VI attached were not “included in the call to the meeting,” the Board will vote on whether to approve them at its November 17, 2022, meeting.

###

Attachment: Amendments to Article VI of work2future By-Laws showing original and new text. **New sections are in bold face.**

## ARTICLE VI: COMMITTEES

- 6.1 *Standing Committees.* Standing committees other than the Executive Committee shall include, in addition to members of the WORK2FUTURE BOARD, individuals who are not members of the WORK2FUTURE BOARD and who the WORK2FUTURE BOARD determines have appropriate experience and expertise.
- 6.2 The WORK2FUTURE BOARD shall have two (2) standing committees:
- a. Executive Committee
  - b. Business Services Committee
- 6.3 **In addition to the Executive Committee and the Business Services Committee, the WORK2FUTURE BOARD may, at its discretion, resolve to have such other standing committees as it deems necessary to the effective discharge of the Board's responsibilities.**
- 6.4 Executive Committee Composition — The Executive Committee shall be comprised of the WORK2FUTURE BOARD Chair, the WORK2FUTURE BOARD Vice-Chair, the chairs of the other standing committees, a sufficient number of members elected at large to ensure that the committee has seven members, and the work2future Director acting as a non-voting, ex officio member.
- 6.5 Terms of the at-large members of the Executive Committee are two years and they shall be staggered to ensure that only a portion of the at-large membership expires in a given year. To achieve staggered terms, a portion of at-large members shall be elected to one-year terms only in the first election after adoption of these amended By-laws. At-large members shall serve a maximum of two consecutive two-year terms.
- 6.6 Executive Committee Chair – The WORK2FUTURE BOARD Chair shall act as Chair of the Executive Committee, the WORK2FUTURE BOARD Vice Chair as Chair of the Executive Committee in his/her absence, and an Executive Committee Member elected by said committee shall act as Chair of the Executive Committee in the event the Chair and the Vice Chair are absent.
- ~~6.6~~6.7 Executive Committee Authority — The Executive Committee shall have the authority to act on behalf of the WORK2FUTURE BOARD when time is of the essence to (1) accept grant awards, (2) approve contracts and associated funding, (3) approve Memoranda of Understanding, and (4) approve the Local Plan and Regional Plan. Any such actions taken by the Executive Committee shall be reported as discussion items at the next regular meeting of the

## WORK2FUTURE BOARD.

**6.76.8** In addition to such other duties as it may undertake, the Executive Committee shall develop and track the budget, and oversee fiscal compliance and work2future performance with respect to state and federal WIOA performance goals.

**6.86.9** Business Services Committee — California Unemployment Insurance Code Section 14200(c)(9)(C) requires that the WORK2FUTURE BOARD establish a business services committee.

**6.96.10** Business Services Committee Composition – The Business Services Committee shall be comprised of Board members who represent the leading industries and employers in the regional economy and potential emerging sectors that have significant potential to contribute to job growth in the regional economy if investments were made for training and educational programs, as well as business executives who are not members of the Board but, nonetheless, represent the kinds of employers described above. The Chair shall appoint Board members to the Committee and the Executive Committee shall elect Committee members who are not on the Board.

**6.106.11** Business Services Committee Duties — The Business Services Committee shall further develop and make recommendations for work2future's business service plan to increase employer involvement in the activities of work2future.

**6.116.12** Additional Standing Committees: when it deems it necessary per Article VI, Section 6.3, the WORK2FUTURE BOARD shall form such one or more additional standing committees by resolution approved by a majority of Board members present at a regular meeting. The resolution shall include the purpose and duties of the committee, and its membership size, composition, qualifications and length or term of service.

**6.11.16.12.1** The majority of members of a standing committee shall be serving members of the WORK2FUTURE BOARD who shall be appointed for a specified term of committee service by the Board Chair. The Board resolution forming the additional standing committee shall specify how individuals who are not serving members of the Board shall be nominated and appointed or elected to the standing committee.

**6.126.13** Chair Appointments - Each committee, except the Executive Committee, will choose its own chairs with the approval of the Board Chair.

~~6.136.14~~ 6.146.14 Ad Hoc Committees – The Chair may appoint ad hoc committees at his/her discretion. The creation of said committees shall be reported to the full Board.

~~6.146.15~~ 6.146.15 Ad Hoc Committee Composition – Ad Hoc Committees may only have as voting members full members of the WORK2FUTURE BOARD. Non-WORK2FUTURE BOARD members may be asked to participate as non-voting members.

~~6.156.16~~ 6.156.16 All Standing Committee meetings shall be subject to the provisions of the Ralph M. Brown Act and the City of San José's Consolidated Open Government and Ethics Resolution.

~~6.166.17~~ 6.166.17 Information regarding meetings of Standing Committees will be made available to WORK2FUTURE BOARD members and the public on work2future's website.

~~6.176.18~~ 6.176.18 Except as stipulated in Article 6.7, all actions of the WORK2FUTURE BOARD Standing Committees are advisory to the WORK2FUTURE BOARD unless the WORK2FUTURE BOARD delegates the authority to act on behalf of the WORK2FUTURE BOARD.



## **IV.D**

# **Labor Market Consultant Pool RFQ**

**[Information]**

### **LABOR MARKET CONSULTANT POOL RFQ**

work2future staff first created a multi-year pool of prequalified Labor Market Information (LMI) consultants in 2014, utilizing the City of San Jose's Request for Qualifications (RFQ) process. Prior to the pool, staff would commission LMI research projects one-by-one using Requests for Proposals (RFP), a process that was time-consuming and risked the timeliness of LMI research.

This first prequalified consultant pool was created to stand for two years, allowing work2future staff to commission labor market-related research and analysis projects in less time than a Request for Proposals (RFP) would have required.

Following the expiration of the initial prequalified LMI consultant pool, an RFQ was released in 2016 to select consultants for a second consultant pool, this time for four years.

Consultants from the prequalified pools researched and wrote reports on the construction labor market, the Silicon Valley Dichotomy (I and II), the impact of artificial intelligence and COVID-19 on the future of work in the region, and more.

Staff are working on an RFQ for a new prequalified labor market consultant pool that will stand for four years from 2023 through 2026. Staff are hoping to have the pool selected by the beginning of 2023.

###

## **IV.E**

### **Ad Hoc RFP Committee**

**[Information]**

### **AD HOC RFP COMMITTEE**

The term of the ad hoc committee studying the Request for Proposals (RFP) process concluded June 30, 2022.

At the July 21, 2022, meeting of the Executive Committee, Ad Hoc RFP Committee Chair Chad Bojorquez presented the ad hoc committee's report in draft, including recommendations for the Executive Committee's discussion.

The draft report included calls for the Board and staff to engage in strategic planning; formal opportunities for continuous improvement; documentation and transparency in the RFP process to support informed decision making; training and logistical support for staff, Board members, reviewers and others involved in implementing RFPs; the inclusion of people with "live experience" in the selection process; and for Board members and staff to review the ad hoc committee's reference materials and engage in reflection and further discussion.

Staff requested time to review the recommendations, including with the City Attorney's Office, with follow-up discussions planned for future Executive Committee meetings.

###

**IV.F**

## **Business Services**

**[Information]**

### **BUSINESS SERVICES**

Report on work2future's business services activity since the March 2022 Board meeting, including WARN (layoff) and related response activity, the Workforce Accelerator Fund 9.0 grant-supported Career Accelerator pilot, career fairs, and development of a program to support Incumbent Worker Training. The report will be provided by Business Services Committee Chair George Chao and staff.

# # #

## **IV.G**

# **Labor Market Information**

**[Information]**

### **LABOR MARKET INFORMATION**

The unemployment rate in the San Jose-Sunnyvale-Santa Clara MSA was 2.2 percent in July 2022, down from a revised 2.3 percent in June 2022, and below the year-ago estimate of 5.1 percent. This compares with an unadjusted unemployment rate of 3.9 percent for California and 3.8 percent for the nation during the same period. The unemployment rate was 2.1 percent in Santa Clara County. Strategic Engagement Manager Lawrence Thoo will report on and discuss this and other regional labor market conditions.

###



**V.**

**Other**

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**VI.**

**Adjournment**