



## EXECUTIVE COMMITTEE MEETING

Thursday, April 20, 2023, 11:30 am

Almaden Room, Business and Administrative Services Center,  
5730 Chambertin Dr, San Jose, CA 95118

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

### HYBRID MEETING

Members of the public may attend the meeting in person at the location above or virtually by computer, smartphone, and tablet at

<https://zoom.us/j/99335913145?pwd=M1dROFI0M3BSRXhCN3Y3Uk5mcjYyQT09>

To provide Spoken Public Comment *during* the meeting:

a) **Phone** (669) 219-2599, Meeting ID 993 3591 3145. **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 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 on 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 9:30 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.

## EXECUTIVE COMMITTEE

### MEMBERS | 2023

Susan Koepf-Baker, *Board Chair*  
Principal  
Enviro-Tech Services

Priya Smith, MPH, *Board Vice-Chair*  
Medical Group Administrator  
The Permanente Medical Group  
Kaiser Permanente

John “Jack” Estill, *Youth Committee Chair*  
Partner  
Coactify

Alan Takahashi, *Business Services Committee Chair*  
Vice President and General Manager  
Multifunction Microwave Solutions  
CAES

Louise Auerhahn  
Director of Economic & Workforce Policy  
Working Partnerships USA

Rajiv Batra  
Senior Director  
Bluevine

Chad Bojorquez  
Chief Program Officer  
Destination: Home

*Ex Officio*

Monique Melchor  
work2future Director

## EXECUTIVE COMMITTEE MEETING

April 20, 2023  
11:30 am

Almaden Room, Business and Administrative Services Center, Almaden Winery,  
5730 Chambertin Dr, San Jose

Online at <https://zoom.us/j/99335913145?pwd=M1dROFI0M3BSRXhCN3Y3Uk5mcjYyQT09>

### AGENDA

- |  |                        |
|--|------------------------|
| <b>I. CALL TO ORDER &amp; ROLL CALL</b>  | 5 min<br>11:35 am end  |
| <b>II. CONSENT ITEMS {ACTION}</b><br>Approval of the acceptance of:  | 5 min<br>11:40 am end  |
| <b>A. Minutes of the February 16, 2023, Executive Committee meeting</b>  |                        |
| <b>B. Minutes of the February 27, 2023, Executive Committee Special Meeting</b>  |                        |
| <b>C. Financial Status Report as of February 28, 2023</b>  |                        |
| <b>III. OPEN FORUM</b><br>Members of the public can address the committee on matters not on the agenda.<br>Comment is limited to two minutes unless modified by the Chair.   | 5 min<br>11:45 am end  |
| <b>IV. BUSINESS ITEMS</b>  |                        |
| <b>A. Director's Report {Information}</b><br><i>Monique Melchor, Director</i><br>Reports on various matters of interest.   | 5 min<br>11:50 am end  |
| <b>B. Board Recertification {ACTION}</b><br><i>Monique Melchor, Director</i><br>Approval on behalf of the Board of the application to the California Workforce Development Board for recertification of the work2future Board.                               | 10 min<br>12:00 pm end |
| <b>C. WIOA Client Outcomes {Information}</b><br><i>Sangeeta Durrall, Program Services Manager</i><br>Report on PY2021-22 Adult Program, Dislocated Worker Program, and Youth Program client outcomes and on PY2022-23 Youth Program client outcomes to date. | 10 min<br>12:10 pm end |
| <b>D. work2future Board Retreat Follow-up {Information}</b><br><i>Susan Koepp-Baker, Board Chair, Executive Committee Chair</i><br>Report on the plan to follow up on the Board retreat held on March 16, 2023.  | 5 min<br>12:15 pm end  |
| <b>E. Business Services Committee Report {Information}</b><br><i>Alan Takahashi, Business Services Committee Chair</i><br>Business Services Committee Chair's report.  | 5 min<br>12:20 pm end  |

- |   |                     |
|---|---------------------|
| <b>F. Youth Committee Report {Information}</b>  | <i>5 min</i>        |
| <i>Jack Estill, Youth Committee Chair</i>   | <i>12:25 pm end</i> |
| Youth Committee Chair's report.   |                     |
| <b>G. Labor Market Update {Information}</b>   | <i>15 min</i>       |
| <i>Lawrence Thoo, Strategic Engagement Manager</i>  | <i>12:40 pm end</i> |
| Currently available data and analysis on the labor market in Santa Clara County and the San Jose-Sunnyvale-Santa Clara Metropolitan Statistical Area. |                     |
| <b>V. OTHER</b>   | <i>5 min</i>        |
| Announcements, suggested business for future meetings, other housekeeping   | <i>12:40 pm end</i> |
| <b>VI. ADJOURNMENT</b>  |                     |

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Please note: *Times to the right of agenda items are estimates only of the duration of the 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 video teleconference open to the public. The Code of Conduct will apply to the extent possible in a video teleconference 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 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**

# II

## Consent Items

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

- A. Minutes of the February 16, 2023, Executive Committee Meeting
- B. Minutes of the February 27, 2023, Executive Committee Special Meeting
- C. Financial Status Report as of February 28, 2023

**{Action}**



**EXECUTIVE COMMITTEE****February 16, 2023****11:30 am****MINUTES**

STAFF: Durrall, Luu, Thoo, Walter

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

**I. CALL TO ORDER & ROLL CALL**

Chair Koepp-Baker called the Zoom meeting to order at 11:31 am.

**Roll Call**

**Present:** Auerhahn, Bojorquez, Estill, Koepp-Baker, Smith, Takahashi

**Absent:** Batra

**II. CONSENT ITEMS**

ACTION: Mr. Estill moved, Mr. Bojorquez seconded, and the committee unanimously approved the acceptance of the minutes of the January 19, 2023, Executive Committee meeting.

**III. OPEN FORUM**

Chair Koepp-Baker asked for any public comments. None were noted.

**IV. BUSINESS ITEMS****A. Director's Report**

This agenda item was deferred to the next scheduled meeting.

**B. Performance and Enrollment Report**

Program Services Manager Sangeeta Durrall provided a report on WIOA performance and enrollments in the Adult, Dislocated Worker, and Youth programs through January 31, 2023. There was some discussion about ongoing efforts with out-of-school Youth, building partnerships with local Youth organizations, possible expansion of the in-school Youth program after its inaugural year, and additional tracking of the certification pipeline for Youth participants.

**C. Local & Regional Plan Modifications**

Ms. Durrall requested that the Committee recommend Board approval of modifications to the Local Plan and the Regional Plan for submission to the State of California.

ACTION: Mr. Estill moved, Ms. Smith seconded, and the committee unanimously approved a recommendation that the Board approve the modifications to the Local and Regional Plans for submission to the State of California.

**D. work2future RFP Process Review**

Contracts Manager Dat Luu reported on the review of, and the revisions to, the City's Request for Proposals (RFP) bid process as applied for the procurement of WIOA Adult, Dislocated Worker, and Youth program services. Mr. Luu noted an issue of concern regarding the participation of former work2future clients in the review panel. The matter is under review by the City Attorney. Staff anticipates an answer to this issue in March 2023. There was some discussion regarding this review as well as the next steps in the process.

**E. Business Services Committee Report**

Business Services Committee Chair Alan Takahashi reported on Committee activities, noting an uptick in layoff activity since the beginning of 2023, as well as a possible shift in hiring trends.

**F. Youth Committee Report**

Youth Committee Chair Jack Estill reported on Committee activities, providing an update on the nomination and approval of both Board and non-Board members, and a recent staff review of Youth participation and enrollment statistics. Mr. Estill also gave the Committee an overview of the content presented at a recent Youth Forum meeting. There was some discussion regarding mentorship needs of Youth participants.

**G. Grants**

Strategic Engagement Manager Lawrence Thoo briefed the Committee about selected recent grant approvals and submissions in which work2future is a partner, including the Regional Equity and Recovery Partnerships grant involving local workforce boards and community colleges, the Community Economic Resilience Fund (CERF) Phase 1 planning grant award, the CERF Economic Development Pilot partnership led by the City of San José, and the CERF Economic Development Pilot led by the Bay Area Good Jobs Partnership for Equity. There was some discussion regarding the allocation of awarded funding.

**H. Labor Market Update**

Strategic Engagement Manager Thoo reported on the status of the labor market in Santa Clara County and the San José-Sunnyvale-Santa Clara Metropolitan Statistical Area (MSA). The unemployment rate in the MSA was 2.1 percent in December 2022, down from a revised 2.4 percent in November 2022, and below the year-ago estimate of 2.9 percent, according to the Employment Development Department's Labor Market Information Division. This compares with an unadjusted unemployment rate of 3.7 percent for California and 3.3 percent for the nation during the same period. The unemployment rate was 2.0 percent in Santa Clara County. Total employment for the month in the MSA, which also includes San Benito County, remained flat, with a net increase of 300 jobs to reach 1,195,900. There was some discussion about the deployment of Rapid Response resources within the MSA.

There was some discussion regarding recent news reports about inflation and real wages, as well as the ripple effects of layoffs at larger tech companies.

**V. OTHER****A. Special Meeting of Executive Committee**

Mr. Thoo informed the Committee that staff will be reaching out to members to schedule a

Special Meeting to review and act on preliminary budget scenarios for FY23-24 and other financial matters.

Chair Koepp-Baker asked for other announcements or housekeeping items. None were noted.

**VI. ADJOURNMENT**

Chair Koepp-Baker adjourned the Zoom meeting at 12:44 pm.

*Drafted: D. Walter. Reviewed: L. Thoo.*

**DRAFT**

**EXECUTIVE COMMITTEE SPECIAL MEETING****February 27, 2023****2:00 pm****MINUTES**

STAFF: Melchor, Qedwai, Alvarez, Thoo, Walter

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

**I. CALL TO ORDER & ROLL CALL**

Chair Koeppe-Baker called the Zoom meeting to order at 2:01 pm.

**Roll Call**

**Present:** Auerhahn, Batra, Estill, Koeppe-Baker, Takahashi

**Absent:** Bojorquez, Smith

**II. CONSENT ITEMS**

There was some discussion about the status of specific grant funding and spending goals for the remainder of FY22-23.

ACTION: Mr. Estill moved, Ms. Auerhahn seconded, and the committee unanimously approved the acceptance of the Financial Status Report as of December 31, 2022.

**III. OPEN FORUM**

Chair Koeppe-Baker asked for any public comments. None were noted.

**IV. BUSINESS ITEMS****A. Preliminary Scenarios for FY2023-24 Program Operating Budget**

Finance Manager Rehan Qedwai asked the Committee to recommend Board approval of three preliminary budget scenarios for Fiscal Year 2023-24, as follows: a) Proposed FY 2023-24 WDB Program Budget based on a projected allocation of \$7.023 million (base scenario, allocation AS IS); b) Proposed FY 2023-24 WDB Program Budget based on a projected allocation of \$6.672 million (5% reduction from the previous allocation); and c) Proposed FY 2023-24 WDB Program Budget based on a projected allocation of \$7.374 million (5% increase from the previous allocation).

There was some discussion about planned carryover funds, allocation of funds, future budgets, and use of pandemic funds.

ACTION: Mr. Estill moved, Ms. Auerhahn seconded, and the committee unanimously recommended Board approval of the three preliminary budget scenarios for Fiscal Year 2023-24.

**V. ADJOURNMENT**

Chair Koepp-Baker adjourned the Zoom meeting at 2:38 pm.

*Drafted: D. Walter. Reviewed: L. Thoo.*

**DRAFT**

## **PRELIMINARY FINANCIAL STATUS as of FEBRUARY 28, 2023**

### **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, only \$193,393 of the \$361,588 were spent.
- As of February 28, 2023, work2future has \$4.44 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: \$829,030
  3. Projected savings of \$2,563,232 which comprised of the following:
    - a. Savings from personnel & non-personnel costs: \$894,202
    - b. Savings from unspent clients' training, supportive services, and service provider costs: \$1,669,030

### **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. The original grant period was April 1, 2021, to September 30, 2022, but was extended to December 31, 2022. In addition, funded amount was reduced from \$25,000 to \$2,768. Of the \$2,768 revised funded amount, \$1,724 was spent with an unspent balance of \$276.
- 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 February 28, 2023, 77% of the grant funds 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 (NDWG). work2future was allotted \$500,000 to

- help implement the grant. The goal of the CAREER NDWG 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 August 19, 2023. work2future program implementation starts on April 1, 2022. As of February 28, 2023, approximately 61% 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 90% of the funds were spent as of February 28, 2023.
  - 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 February 28, 2023, approximately 25% of the funds were spent. On November 30, 2022, NPower informed work2future that the State has discontinued their funding until further notice. work2future is waiting for an official letter from NPower.
  - 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 February 28, 2023, 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. As of February 28, 2023, 94% 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.

<b>Funding Source</b>	<b>Sponsorship/ Contributions</b>	<b>Sub-grants</b>
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.
- Wells Fargo donated \$25,000 for San Jose Works 8.0 Work Experience program.
- 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.

###

Attachment

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	<b>2,472,320</b>	<b>1,528,157</b>	<b>1,975,827</b>	<b>505,829</b>	<b>6,482,133</b>
<i>Actual Expenditures as of June 30, 2022</i>	(938,673)	(285,170)	(455,272)	(144,241)	(1,823,356)
<i>Encumbrances/Spending Plan as of June 30, 2022</i>	(2,921)	(2,435)	(40,625)	0	(45,981)
<i>Total Actual Expenditures/Encumbrances/Spending Plan as of June 2022</i>	(941,594)	(287,605)	(495,897)	(144,241)	(1,869,337)
Available Funds for FY2022-2023	<b>1,530,726</b>	<b>1,240,552</b>	<b>1,479,931</b>	<b>361,588</b>	<b>4,612,796</b>
% 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.)	<b>1,533,647</b>	<b>1,242,987</b>	<b>1,520,555</b>	<b>361,588</b>	<b>4,658,777</b>
Transfer between Adult and Dislocated Worker	0	0	0	0	0
Rescission				(152,905)	(152,905)
<i>Expenditures as of February 28, 2023</i>	(1,456,887)	(834,732)	(1,072,900)	(208,683)	(3,573,202)
<i>Encumbrances as of February 28, 2023</i>	(76,760)	(408,255)	(372,655)	0	(857,670)
<i>Total Actual Expenditures/Encumbrances as of February 28, 2023</i>	(1,533,647)	(1,242,987)	(1,445,555)	(208,683)	(4,430,872)
<b>\$ Remaining</b>	<b>0</b>	<b>0</b>	<b>75,000</b>	<b>0</b>	<b>75,000</b>
<b>% Remaining</b>	<b>0%</b>	<b>0%</b>	<b>5%</b>	<b>0%</b>	<b>2%</b>
(b) <b>Current Allocation for FY 2022-2023</b>	<b>2,181,118</b>	<b>2,586,974</b>	<b>2,255,378</b>	<b>512,371</b>	<b>7,535,841</b>
Additional Funding	0	0	0	0	0
Transfer between Adult and Dislocated Worker	0	0	0	0	0
Rescission	0	0	0	0	0
<b>Adjusted Allocation for FY 2022-2023</b>	<b>2,181,118</b>	<b>2,586,974</b>	<b>2,255,378</b>	<b>512,371</b>	<b>7,535,841</b>
<i>Expenditures as of February 28, 2023</i>	(130,332)	(139,424)	(49,609)	(182,617)	(501,982)
<i>Encumbrances as of February 28, 2023</i>	(991,539)	(164,812)	(1,094,430)	(30,750)	(2,281,531)
<i>Total Actual Expenditures/Encumbrances as of February 28, 2023</i>	(1,121,871)	(304,236)	(1,144,039)	(213,367)	(2,783,512)
<b>\$ Remaining</b>	<b>1,059,247</b>	<b>2,282,738</b>	<b>1,111,339</b>	<b>299,004</b>	<b>4,752,329</b>
<b>% Remaining</b>	<b>49%</b>	<b>88%</b>	<b>49%</b>	<b>58%</b>	<b>63%</b>
<b>Total Available Funds for FY2022-2023</b>	<b>3,714,765</b>	<b>3,829,961</b>	<b>3,775,933</b>	<b>873,959</b>	<b>12,194,618</b>
<i>Total Cumulative Expenditures/Encumbrance as of February 28, 2023</i>	(2,655,518)	(1,547,223)	(2,589,594)	(422,050)	(7,214,385)
<b>\$ Remaining</b>	<b>1,059,247</b>	<b>2,282,738</b>	<b>1,186,339</b>	<b>451,909</b>	<b>4,980,234</b>
<b>% Remaining</b>	<b>29%</b>	<b>60%</b>	<b>31%</b>	<b>52%</b>	<b>41%</b>
<b>III. Projected Expenditures/Carry Over through June 30, 2023</b>					
<i>Projected Expenditures through June 2023</i>	(1,044,492)	(1,412,354)	(1,053,511)		(3,510,357)
<i>Projected Carry Over through June 2023 (\$)</i>	1,213,386	1,582,875	1,649,522	0	4,445,783
<i>Projected Carry Over through June 2023 (%) with Rapid Response</i>	56%	61%	73%	0%	59%
<i>Projected Carry Over through June 2023 (%) without Rapid Response</i>	56%	61%	73%	0%	63%

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>		10/1/2021 - 12/31/2022	4/10/2020 - 3/31/2023	04/1/2022-08/19/2023	06/01/2021 - 03/31/2023	10/14/2021 - 03/31/2023	
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	(22,232)	0	0	0	0	(22,232)
Total Available Funding for FY 2022-2023	5,000	2,000	158,690	474,184	213,001	56,691	909,565
Expenditures as of February 28, 2023	0	(1,724)	(112,824)	(99,253)	(34,122)	(13,919)	(261,842)
Encumbrances as of February 28, 2023	0	0	(10,000)	(191,208)	(158,392)	0	(359,599)
Cumulative Expenditures/Encumbrances as of February 28, 2023	0	(1,724)	(122,824)	(290,461)	(192,513)	(13,919)	(621,441)
Remaining	5,000	276	35,866	183,723	20,487	42,772	288,124
% Remaining	100%	14%	23%	39%	10%	75%	32%
<b>III. Projected Expenditures/Carry Over</b>							
Projected Expenditures through June 2023	0	0	0	(183,726)	0	0	(183,726)
Projected Carry Over through June 2023 (\$)	5,000	0	0	290,458	0	0	295,458
Projected Carry Over through June 2023 (%)	100%	0%	0%	61%	0%	0%	32%

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>								
<b>Grant Period</b>	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
<b>Total Available Funding for FY 2022-2023</b>	<b>2,682,070</b>	<b>91,666</b>	<b>30,000</b>	<b>84,900</b>	<b>7,500</b>	<b>100,000</b>	<b>5,000</b>	<b>3,001,136</b>
Expenditures as of February 28, 2023	(1,143,696)	(91,666)	(28,325)	0	0	0	0	(1,263,688)
Encumbrances as of February 28, 2023	(318,455)	0	0	0	0	0	0	(318,455)
<b>Cumulative Expenditures/Encumbrances as of February 28, 2023</b>	<b>(1,462,151)</b>	<b>(91,666)</b>	<b>(28,325)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>(1,582,142)</b>
Remaining	1,219,919	0	1,675	84,900	7,500	100,000	5,000	1,418,994
% Remaining	45%	0%	6%	100%	100%	100%	100%	47%
<b>III. Projected Expenditures/Carry Over</b>								
Projected Expenditures through June 2023	(2,011,033)	0	(1,675)	(84,900)	0	0	0	(2,097,608)
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 02/28/23**  
**Pd 8 Status 3**

<b>Other Funds</b>	<b>CWDB</b>	<b>BOS</b>	<b>Total</b>
<b>I. Actual as of June 30, 2022</b>			
<b>Grant Period</b>	<b>N/A</b>	<b>N/A</b>	
<b>Original Allocation/Available Funds for FY21-22</b>	<b>4,042</b>	<b>8,900</b>	<b>12,942</b>
Expenditure/Encumbrances as of June 2022	0	(1,062)	(1,062)
<i>Total Actual Expenditures/Encumbrances as of June 2022</i>	0	(1,062)	(1,062)
<b>Available Funds for FY 2022-2023</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>II. Actual Expenditures/Encumbrances</b>			
Available Funds for FY 2022-2023	<b>4,042</b>	<b>7,838</b>	<b>11,880</b>
<i>Expenditures as of February 28, 2023</i>	0	(2,047)	(2,047)
<i>Encumbrances as of February 28, 2023</i>	0	0	0
<b>Cumulative Expenditures as of Baljinder 28, 2023</b>	0	(2,047)	(2,047)
<b>\$ Remaining</b>	<b>4,042</b>	<b>5,791</b>	<b>9,833</b>
<b>% Remaining</b>	<b>100%</b>	<b>74%</b>	<b>83%</b>
<b>III. Projected Expenditures/Carry Over</b>			
<i>Projected Carry Over through June 2023</i>	<b>4,042</b>	<b>5,791</b>	<b>9,833</b>
<i>Projected Carry Over (%) through June 2023</i>	<b>100%</b>	<b>100%</b>	<b>100%</b>

work2future  
Preliminary Financial Status Report as of 02/28/23  
Pd 8 Status 3

Other Funds	Google work2future Relocation	Google WEX and Training	Google Child Care	Total
<b>I. Actual as of June 30, 2022</b>				
<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 2022-2023	<b>224,251</b>	<b>625,000</b>	<b>600,000</b>	<b>1,449,251</b>
<i>Expenditures as of February 28, 2023</i>	<i>(114,020)</i>	<i>0</i>	<i>0</i>	<i>(114,020)</i>
<i>Encumbrances as of February 28, 2023</i>	<i>(300)</i>	<i>0</i>	<i>0</i>	<i>(300)</i>
<b>Cumulative Expenditures as of February 28, 2023</b>	<b>(114,320)</b>	<b>0</b>	<b>0</b>	<b>(114,320)</b>
<b>\$ Remaining</b>	<b>109,930</b>	<b>625,000</b>	<b>600,000</b>	<b>1,334,930</b>
<b>% Remaining</b>	<b>49%</b>	<b>100%</b>	<b>100%</b>	<b>92%</b>
<b>III. Projected Expenditures/Carry Over</b>				
<b>Projected Carry Over through June 2023</b>	<b>109,930</b>	<b>625,000</b>	<b>600,000</b>	<b>1,334,930</b>
<b>Projected Carry Over (%) through June 2023</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

# **III**

## **Open Forum**

# **IV.A**

## **Director's Report**

**{Information}**



**DIRECTOR'S REPORT**

Director Monique Melchor will provide information on various matters of interest.

###

## **IV.B**

# **Board Recertification**

**{Action}**

## **BOARD RECERTIFICATION**

### **Recommendation**

Approve on behalf of the Board the application to the California Workforce Development Board for the recertification of the work2future Board, as well as the subsequent designation of the San Jose-Silicon Valley Local Workforce Development Area for Program Years 2023–2025 under the Workforce Innovation and Opportunity Act.

### **Background and Analysis**

Local workforce development boards (local boards) are required periodically to apply to the California Workforce Development Board (state board) for recertification as the local board for the designated local workforce development area (local area). In its application, a local board must attest that it is in compliance with a variety of requirements, including its composition, its engagement with regional partners, its selection of service providers for American Job Centers of California under its supervision, and so forth.

work2future’s application for designation of the local area and board recertification is attached. It is due for submission to the state board on April 28, 2023. As the next meeting of the work2future Board is scheduled for June 15, 2023, staff requests that the Executive Committee approve the application on behalf of the Board. If given, the Executive Committee’s approval will be reported to the Board at the June 15, 2023, meeting.

Following Executive Committee approval, staff will gather signatures from the Board Chair and the Mayor of San Jose in his capacity as the local Chief Elected Official for the local area, and then submit the application to the state board for its consideration.

###

Attachment

**Local Area Subsequent Designation and  
Local Board Recertification Application  
For Program Year 2023-25**

**Local Workforce Development Area**

San Jose-Silicon Valley Local Workforce Development Area

## Application for Local Area Subsequent Designation and Local Board Recertification

This application will serve as your request for Local Workforce Development Area (Local Area) subsequent designation and Local Workforce Development Board (Local Board) recertification for Program Year (PY) 2023-25 under the *Workforce Innovation and Opportunity Act* (WIOA).

If the California Workforce Development Board (CWDB) determines the application is incomplete, it will either be returned or held until the necessary documentation is submitted. Please contact your [Regional Advisor](#) for technical assistance or questions related to completing and submitting this application.

Completed applications must be submitted by 5 p.m. on Friday, April 28, 2023, to the CWDB at [PolicyUnit@cwdb.ca.gov](mailto:PolicyUnit@cwdb.ca.gov).

San-Jose Silicon Valley Local Workforce Development Area

Name of Local Area

5730 Chambertin Drive

Mailing Address

San Jose CA 95118

City, State, ZIP

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Date of Submission

Monique Melchor

Contact Person

408-794-1108 or 408-640-4187

Contact Person's Phone Number

## Local Board Membership

The WIOA Section 107(b)(2)(A) through (E) states the requirements for nominating and selecting Local Board members:

1. Provide the names of the individuals appointed for each membership category listed below.
2. Attach a roster for the current Local Board.

*Category: Business* – WIOA Section 107(b)(2)(A) requires that business members constitute a simple majority of the Local Board, and WIOA Section 107(b)(3) states that the chairperson shall also be a member under this category. Specifically, a majority of the Local Board’s business members shall constitute the following representatives under this membership category:

- Owners of businesses, chief executives or operating officers of businesses, or other business executives or employers with optimum policymaking or hiring authority.
- Representatives of businesses, including small businesses or business organizations.
- Individuals appointed by those who have been nominated by local business organizations and business trade associations.

Please list the Local Board’s business members and identify the chairperson by typing CHAIR after their name:

<b>LOCAL BOARD BUSINESS MEMBERS</b>				
<b>Name</b>	<b>Title</b>	<b>Entity</b>	<b>Appointment Date</b>	<b>Term End Date</b>
Rajiv Batra	Senior Director	Bluevine	December 2017	November 2025
Ricardo Benavidez	Director of Social Infrastructure	Google LLC	August 2022	September 2026
George Chao	Director of Strategic Partnerships	Manex	December 2016	November 2025
Joseph Flynn	Vice President of Software Transformation	CommScope	August 2005	September 2023
Priya Smith	Medical Group Administrator	The Permanente Medical Group, Kaiser Permanente San José	November 2019	October 2023
Alan Takahashi	Vice President and General Manager	Multifunction Microwave Solutions CAES	November 2019	October 2023
John ‘Jack’ Estill	Partner	Coactify	April 2001	September 2026
Susan Koepf-Baker	Principal	Enviro-Tech Services	August 2006	September 2026
Van Le	Agent	State Farm Insurance	December 2006	September 2026
Mitesh Shah	Vice President and Business Unit Head	Tech Mahindra	March 2023	September 2027

*Category: Labor* – At least 20 percent of the Local Board members shall be labor representatives from the Local Area’s workforce. Specifically, the Local Board shall have labor representatives under this membership category from the following entities (WIOA 107[b][2][B]):

- Labor organizations (for a Local Area in which employees are represented by labor organizations) and who have been nominated by local labor federations, or (for a Local Area in which no employees are represented by such organizations) other representatives of employees.
- A member of a labor organization or a training director from a joint labor-management apprenticeship program, or if no such joint program exists in the area, such a representative of an apprenticeship program in the area, if such a program exists.

Members may be representatives from community-based organizations with demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, veterans, or individuals with disabilities; and organizations with demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth and/or out-of-school youth.

*California Unemployment Insurance Code* (CUIC) Section 14202(b)(1) further requires and specifies that at least 15 percent of Local Board members shall be representatives of labor organizations unless the local labor federation fails to nominate enough members. For a Local Area in which such organizations represent no employees, other representatives of employees shall be appointed to the Local Board, but any Board that appoints representatives of employees not nominated by local labor federations must demonstrate that no employees are represented by such organizations in the Local Area.

List the Local Board’s labor members:

<b>LOCAL BOARD LABOR MEMBERS</b>				
<b>Name</b>	<b>Title</b>	<b>Entity</b>	<b>Appointment Date</b>	<b>Term End Date</b>
<b>Brian Murphy</b>	<b>Director of Training</b>	<b>Pipe Trades Training Center, UA Local 393</b>	<b>August 2022</b>	<b>July 2026</b>
<b>Robert Moreno</b>	<b>Training Director</b>	<b>Santa Clara County Electrical Joint Apprentice Training Center, IBEW</b>	<b>August 2020</b>	<b>July 2024</b>
<b>Louise Auerhahn</b>	<b>Director of Economic and Workforce Policy</b>	<b>Working Partnerships USA</b>	<b>September 2014</b>	<b>September 2026</b>

*Category: Education* – WIOA Section 107[b][2][C] requires that each Local Board include members who represent entities that administer education and training activities in the Local

Area. Specifically, the Local Board shall have education representatives under this membership category from the following entities:

- Eligible Title II adult education and literacy providers; and
- Institutions of higher education providing workforce investment activities – In process.

Members may be representatives from local educational agencies and community-based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment.

List the Local Board’s education members:

<b>LOCAL BOARD EDUCATION MEMBERS</b>				
<b>Name</b>	<b>Title</b>	<b>Entity</b>	<b>Appointment Date</b>	<b>Term End Date</b>
Traci Williams	Director	East Side Adult Education	October 2022	September 2026

*Category: Economic and Community Development* – WIOA Sections 107[b][2][D] and [E] require each Local Board to include governmental, economic, and community development representatives under this membership category from the following entities:

- Economic and community development organizations.
- The state’s employment service office under the *Wagner-Peyser Act*.
- Programs carried out under Title I of the federal *Rehabilitation Act*.

A Local Board may have representatives from transportation, housing, and/or public assistance agencies; philanthropic organizations; and/or an individual or representatives of entities determined to be appropriate by the local CEO.

List the Local Board’s economic and community development members:

<b>LOCAL BOARD ECONOMIC AND COMMUNITY DEVELOPMENT MEMBERS</b>				
<b>Name</b>	<b>Title</b>	<b>Entity</b>	<b>Appointment Date</b>	<b>Term End Date</b>
Maria Lucero	Deputy Division Chief, Region 1, Northern Division	Workforce Services Branch Employment Development Department, State of California	March 2017	March 2025
Todd Teixeira	Team Manager (SSM1), San José North Branch	California Department of Rehabilitation	November 2020	October 2024
Rafaela Perez	Employment Services Director	Social Services Agency, County of Santa Clara	September 2018	September 2026
Steve Preminger	Director	Office of Strategic and Intergovernmental	July 2000	September 2026



LOCAL BOARD ECONOMIC AND COMMUNITY DEVELOPMENT MEMBERS				
Name	Title	Entity	Appointment Date	Term End Date
		Affairs, County of Santa Clara		
Chad Bojorquez	Chief Program Officer	Destination: Home	November 2019	October 2023
Emily McGrath	Senior Fellow, Director of Workforce Policy	The Century Foundation	April 2021	March 2025

### Performed Successfully

The Local Area hereby certifies that it has performed successfully, defined as having an Individual Indicator Score of 50% or higher in PY 20-21 OR PY 21-22, as described in Workforce Services Directive *Calculating Local Area Performance and Nonperformance* (WSD20-02) dated September 18, 2020, for the following primary indicators of performance:

- Employment Rate 2<sup>nd</sup> Quarter After Exit
- Median Earnings

### Program Year: 21-22

Performance Scores	Adult	Dislocated Worker	Youth
Employment 2 <sup>nd</sup> Quarter After Exit	92.9%	90.7%	131.1%
Median Earnings	166.1%	140.8%	202.4%

### Sustained Fiscal Integrity

The Local Area hereby certifies that it has not been found in violation of one or more of the following during PY 20-21 or PY 21-22:

- *Final determination of significant finding(s)* from audits, evaluations, or other reviews conducted by state or local governmental agencies or the Department of Labor identifying issues of fiscal integrity or improperly expended funds due to the willful disregard or failure to comply with any WIOA requirement.
- *Gross negligence* – defined as a conscious and voluntary disregard of the need to use reasonable care, which is likely to cause foreseeable grave injury or harm to persons, property, or both.

- *Failure to observe accepted standards of administration* – Local Areas must have adhered to the applicable uniform administrative requirements set forth in Title 2 *Code of Federal Regulations* (CFR) Part 200.

**Certify No Violation:**

### **Engaged in Regional Planning**

*Engaged in regional planning* is defined as participating in and contributing to regional planning, regional plan implementation, and regional performance negotiations. The Local Area hereby certifies that it has participated in and contributed to regional planning and negotiating regional performance measures in the following ways:

- ✓ Monthly Bay Peninsula RPU meetings to meet and discuss items or provide updates.
- ✓ Director meetings with NOVA or San Francisco as needed.
- ✓ Submission of applications for regional grants: CHIPs Grant, DOL Apprenticeship Grant, Regional Equity & Recovery Partnerships funding, CERF opportunity - Bay Area Good Jobs Partnership for Equity (BAGJPE) application submitted,
- ✓ Awarded Grants – Regional Equity and Recovery Partnership (RERP) initiative, Career NDWG, Slingshot 2.0, RPI 3.0, 4.0, P2E, CERF Phase I- Meetings to provide: updates, expenditures, Reports, extensions, Outcomes etc.
- ✓ Coordination of Local and Regional Performance Metrics – The State Performance Negotiation Meeting with region was held on September 21, 2022 - work2future, Nova and San Francisco’s Directors and staff were present.
- ✓ Coordination of Local and Regional Plan modifications – Monthly updates were provided for completion of the Regional Plan and completion of the local plans per the timelines discussed.
- ✓ Coordination to support Regional Advanced Manufacturing Apprenticeships
- ✓ CWA information discussions – Training, CWA Meetings, CWA conferences
- ✓ Community Development Partnership Meeting was held for potential partnership opportunities with community colleges include:
  - Connectivity to the State Department of Apprenticeship Standards
  - Development of formalized apprenticeships and/or more internships
  - Development of pilot projects for those pursuing a STEM degree with the inclusion of a "Success coach" model.
  - Look to share in potential grant opportunities ongoing
  - Career awareness activities in middle and high schools including tours onsite
  - Externships and tours for professors of CC's and middle and high school instructors
  - An "Employer Spotlight" for companies
  - Potential sharing of curriculum already being developed by Community Colleges
  - A look at the potential of a common curriculum informed by industry

## Local Area Assurances

Through PY 23-25, the Local Area assures the following:

- A. It will comply with the applicable uniform administrative requirements, cost principles, and audit requirements (WIOA Section 184[a][2] and [3]).

Highlights of this assurance include the following:

- The Local Area's procurement procedures will avoid acquisition of unnecessary or duplicative items, software, and subscriptions (in alignment with Title 2 CFR Section 200.318).
- The Local Area will maintain and provide accounting and program records, including supporting source documentation, to auditors at all levels, as permitted by law (Title 2 CFR Section 200.508).

Note that failure to comply with the audit requirements specified in Title 2 CFR Part 200 Subpart F will subject the Local Area to potential cash hold (Title 2 CFR Section 200.338).

- B. All financial reporting will be done in compliance with federal and state regulations and guidance.

Highlights of this assurance include the following:

- Reporting will be done in compliance with *Workforce Services Directive Monthly and Quarterly Financial Reporting Requirements* (WSD19-05), dated December 4, 2019.
- All close out reports will comply with the policies and procedures listed in *WIOA Closeout Requirements* (WSD16-05), dated July 29, 2016.

Note that failure to comply with financial reporting requirements will subject the Local Area to potential cash hold (Title 2 CFR Section 200.338).

- C. Funds will be spent in accordance with federal and state laws, regulations, and guidance.

Highlights of this assurance include the following:

- The Local Area will meet the requirements of the *CUIC Section 14211*, to spend a minimum of 30 percent of combined total of WIOA Title I adult and dislocated worker formula fund allocations on training services.
- The Local Area will not use funds to assist, promote, or deter union organizing (WIOA Section 181[b][7]).

- D. The Local Area will select the America's Job Center of California<sup>SM</sup> operator(s) through a competitive procurement process, such as a Request for Proposals, unless designated or certified as an operator with the agreement of the local CEO and the Governor (WIOA Section 121[d][2][A] and 107[g][2]).

- E. The Local Area will collect, enter, and maintain data related to participant enrollment, activities, and performance necessary to meet all CalJOBS<sup>SM</sup> reporting requirements and deadlines.
- F. The Local Area will comply with the nondiscrimination provisions of WIOA Section 188 and 29 CFR Part 38, including the collection of necessary data.
- G. The Local Area will engage in and contribute to, regional planning and regional plan implementation (for example, the Local Area has participated in regional planning meetings and regional plan implementation efforts, and the Local Board and local CEO have reviewed and approved the regional plan and two-year modifications).
- H. The Local Area will participate in regional performance negotiations.
- I. The Local Area will comply with CWDB policies and guidelines, legislative mandates and/or other special provisions as may be required under federal law or policy, including the WIOA or state legislation.
- J. Priority shall be given to veterans, recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient for receipt of career and training services funded by WIOA Adult funding (WIOA Section 134[c][3][E] and *Training and Employment Guidance Letter* [TEGL] 10-09, and TEGL 19-16).

**Application Signature Page**

**Instructions** – The local CEO and Local Board Chair must sign and date this form. Electronic signatures are permitted for the PY 23-25 application.

By signing the application below, the local CEO and Local Board Chair request subsequent designation of the Local Area and recertification of the Local Board. Additionally, they agree to abide by the Local Area assurances included in this application.

Local Workforce Development Board Chair

Local Chief Elected Official

\_\_\_\_\_  
Signature

Susan Koepp-Baker

\_\_\_\_\_  
Name

work2future Board Chair

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

Matt Mahan

\_\_\_\_\_  
Name

Mayor

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

## **IV.C**

# **WIOA Client Outcomes**

**{Information}**

### **WIOA CLIENT OUTCOMES**

Program Services Manager Sangeeta Durrall will provide the Executive Committee a report on PY2021-22 client outcomes in the Workforce Innovation and Opportunity Act Adult Program, Dislocated Worker Program, and Youth Program and on PY2022-23 client outcomes to date in the Youth Program.

###

# **IV.D**

## **work2future Board Retreat Follow-up**

**{Information}**



### **WORK2FUTURE BOARD RETREAT FOLLOW-UP**

work2future Board Chair Susan Koepp-Baker has asked Board members Ricardo Benavidez, Steve Preminger, Mitesh Shah and Traci Williams, and Youth Committee member Sofia Jaquez, to serve as an ad hoc committee to review and refine the ideas that were offered at the March 16, 2023, Board retreat, and to recommend a prioritized set or subset of actionable ideas for the Executive Committee to consider.

Shawn Spano, who facilitated the retreat, will also facilitate the work of the ad hoc committee, which is expected to take one or two meetings. The goal for the ad hoc committee is to present its recommendations at the May 18, 2023, Executive Committee meeting.

###

## **IV.E**

# **Business Services Committee Report**

**{Information}**

**BUSINESS SERVICES COMMITTEE REPORT**

Business Services Committee Chair Alan Takahashi will report on the activities of the committee. (Standing item.)

###

## **IV.F**

# **Youth Committee Report**

**{Information}**

## **YOUTH COMMITTEE REPORT**

Youth Committee Chair Jack Estill will report on the activities of the committee. (Standing Item)

###

# **IV.G**

## **Labor Market Update**

**{Information}**

### **LABOR MARKET UPDATE**

The February 2023 unemployment rate in the San Jose-Sunnyvale-Santa Clara Metropolitan Statistical Area (MSA) was 3.2 percent, up from a revised 3.1 percent in January 2023, but still below the year-ago estimate of 3.3 percent, according to the Employment Development Department's Labor Market Information Division. This compares with an unadjusted unemployment rate of 4.8 percent for California and 3.9 percent for the nation during the same period. The unemployment rate was 3.1 percent in Santa Clara County. Total employment for the month in the MSA, which also includes San Benito County, marked a sharp reversal from the January loss of more than 20,000 jobs, with a net increase of 6,100 jobs to reach 1,174,600. Strategic Engagement Manager Lawrence Thoo will report on and discuss this and other regional labor market conditions.

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**V**

**Other**

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**VI**

**Adjournment**