

## **JOINT RETREAT OF THE WORKFORCE DEVELOPMENT BOARD AND ITS BUSINESS SERVICES AND YOUTH COMMITTEES**

**March 16, 2023  
MINUTES**

Staff: Beltran, Luu, Melchor, Thoo, Walter

Guests: Shawn Spano, Facilitator; Omar Rodriguez, Enrollment Specialist, Equus Workforce Solutions

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

The retreat was called to order at 12:28 pm by Chairperson Susan Koepp-Baker.

#### **Roll Call**

Present: Auerhahn, Benavidez, Bojorquez, Estill, Koepp-Baker, McGrath, Murphy, Perez, Preminger, Teixeira, Williams, Shah, Clark, Jaquez, Vans

Absent: Batra, Chao, Flynn, Le, Lucero, Moreno, Smith, Takahashi, Herrity

### **II. RETREAT ITEMS**

#### **A. Set Retreat Context**

Chairperson Susan Koepp-Baker and Facilitator Shawn Spano shared their goals for the afternoon retreat.

#### **B. Board Member Introduction Activity**

Board and committee members worked in teams to introduce each other, describing their professional and work-related backgrounds, interests, and skills in serving on the Board, and their accomplishment goals for the coming year.

#### **C. WIOA and work2future Orientation**

Lawrence Thoo, Strategic Engagement Manager, briefed the Board and committee members on the role of local workforce development boards as described in the Workforce Innovation and Opportunity Act (WIOA) of 2014 and by supervising bodies in California.

Omar Rodriguez, Enrollment Specialist at Equus Workforce Solutions, informed the Board and committee members about different client services that are provided to job seekers and the enrollment process for new clients.

There was discussion among the Board and Committee members regarding various aspects of the larger workforce development board system as well the work2future enrollment processes.

#### **D. Develop Goals and Generate Improvement Ideas**

In breakout groups, Board and Committee members identified goals they want to achieve, and ideas to improve services and organizational effectiveness. Each group reported their key ideas to the larger retreat.

There was some discussion among the Board and committee members about the various ideas.

**E. Next Steps**

Shawn Spano, Facilitator, summarized the results of the group discussions and identified the next steps needed to prepare the Board to finalize the goal and improvement ideas.

**III. OPEN FORUM**

**A.** Ms. Koepp-Baker opened the floor for public comment. None were noted.

**IV. ADJOURNMENT**

Retreat adjourned at 3:59 pm.

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Draft: D. Walter  
Edit Review: L. Thoo