



## **A G E N D A**

**February 16, 2023  
3:00 p.m.**

Meeting will be held as a  
***Teleconference Meeting & In Person (limited seating available)***  
***Workforce Assistance Center***  
***2037 W. Cleveland Avenue, Madera, CA 93637, 559-662-4589***

Per California Assembly Bill 361, which allows local and state legislative bodies to hold meetings via teleconference and to make meetings accessible electronically, this regular meeting will be held via conference call and can be accessed as follows: <https://us02web.zoom.us/j/81274206285?pwd=enROtm03RTRidG5EcnhTM2Y2TXRWdz09>  
Please call: 1-669-900-9128; Meeting ID: 812 7420 6285; Password: 274155.

**REASONABLE ACCOMMODATION FOR ANY INDIVIDUAL WITH A DISABILITY** Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in a meeting or function of the Workforce Development Board of Madera County, may request assistance by contacting the Executive Assistant at Madera County Workforce Investment Corporation office, 2037 W. Cleveland Avenue, Madera, CA 93637; Telephone 559/662-4589; CRS 711; Fax 559/673-1794.

If a quorum of the Workforce Development Board is not present at the time of the meeting BUT a quorum of the Workforce Development Board Executive Committee IS present, an Executive Committee board meeting will be conducted in place of the Workforce Development Board.

This agenda and supporting documents relating to the items on this agenda are available through the Workforce Development Board website at <http://www.maderaworkforce.org/workforce-board-meetings/>. These documents are also available at the Madera County Workforce Assistance Center – office of the Executive Director. The Workforce Development Board is an equal Opportunity Employer/Program. Auxiliary aids and services are available upon request.

### **ELECTRONIC MEETING INSTRUCTIONS**

The Workforce Development Board of Madera County uses Zoom as the tool to facilitate electronic meetings. Our desire is to ensure orderly Zoom meetings and to help attendees have confidence in how the meeting will be facilitated and that all members and public will be effectively heard. The following instructions provide consistent methods that will lead us to realizing that desire.

- We highly recommend use of the Zoom client app, as this tool greatly enhances the attendee's experience and provides readily accessible controls.
- Remain muted until speaking and mute again when finished speaking.
- Ensure your name shows on your connection.
- Votes will be facilitated with a roll call.
- When connecting to Zoom, if using the phone is preferred over computer audio, we request you connect to the Zoom meeting first and then choose Phone for the preferred audio connection. Input the meeting and participant IDs to relate your phone audio to your Zoom connection.
- Please avoid having both computer audio and phone audio activated as this can cause sound problems.
- If connecting via phone only, \*6 will toggle mute/unmute.
- Public comments will only be taken when a hand is raised. On the phone-only connection, \*9 raises the hand. You must be recognized by the presiding officer of the meeting before speaking.



## **A G E N D A**

**February 16, 2023  
3:00 p.m.**

### **1.0 Call to Order**

- 1.1 Pledge of Allegiance

### **2.0 Additions to the Agenda**

Items identified after preparation of the agenda for which there is a need to take immediate action. Two-thirds vote required for consideration (Government Code Section 54954.2(b)(2))

### **3.0 Public Comment**

This time is made available for comment from the public on matters within the Board's jurisdiction but not appearing on the agenda. The Board will not take action on any items presented under public comment. The comment period will be limited to 15 minutes.

### **4.0 Introductions and Recognitions**

### **5.0 Adoption of Board Agenda**

### **6.0 Consent Calendar**

- 6.1 Ratification of approval of Resolution 2021-01 authorizing remote teleconferencing for the period of January 16, 2023, through February 14, 2023, in accordance with Assembly Bill 361.
- 6.2 Consideration of approval of Resolution 2021-01 authorizing remote teleconferencing for the period of February 15, 2023, through March 16, 2023, in accordance with Assembly Bill 361.
- 6.3 Consideration of approval of the January 13, 2023, Workforce Development Board (WDB) Executive Committee meeting minutes.
- 6.4 Consideration of approval of the February 9, 2023, WDB Executive Committee meeting minutes.
- 6.5 Consideration of approval of the December 15, 2022, WDB meeting minutes.
- 6.6 Consideration of approval of the appointment of Robert Poythress as the Board of Supervisors representative on the WDB.
- 6.7 Consideration of approval of the re-appointment of Jorge DeNava, Central Valley Opportunity Center, to the Workforce Development Board for an additional 3-year term: 4/4/23 to 4/4/26.

### **7.0 Action Items**

- 7.1 Consideration of approval of the draft Workforce Innovation and Opportunity Act PY 2021-2024 Regional Biennial Plan Modification and forwarding the plan to the Madera County Board of Supervisors for final review and approval at the conclusion of the public comment period.
- 7.2 Consideration of approval of Beaudette Inc.'s One Stop Operator (OSO) report for the period of October 1, 2022, through December 31, 2022.

### **8.0 Information Items**

- 8.1 WDB Workshop: Program and Data Reports
- 8.2 Update on Madera Community Hospital Closure and Rapid Response
- 8.3 California Workforce Association (CWA) Article on English Language Services in Madera County
- 8.4 Madera County Workforce Investment Corporation (MCWIC) Update

8.5 WIOA Formula and Special Projects Quarterly Program Overview

8.6 Information on Weekly Unemployment Insurance (UI) Initial Claims for Madera County

8.7 Form 700 Due April 1, 2023

**9.0 Written Communication**

9.1 Fiscal Review 85% Formula Grant Fiscal Year 2021-22 Final Monitoring Report

**10.0 Open Discussion/Reports/Information**

11.1 Board Members

11.2 Staff

**11.0 Next Meeting**

April 20, 2023

**12.0 Adjournment**

**RESOLUTION NO. 2021-01**

**WORKFORCE DEVELOPMENT BOARD OF MADERA COUNTY**

**ADOPTING FINDINGS THAT THERE IS A PROCLAIMED STATE OF EMERGENCY AND THAT MEETING IN PERSON POSES IMMINENT HEALTH AND SAFETY RISKS TO ATTENDEES AND AUTHORIZING REMOTE TELECONFERENCE MEETINGS FOR THE BOARD FOR THE PERIOD OF JANUARY 16, 2023, through FEBRUARY 14, 2023**

**WHEREAS**, on March 4, 2020, Governor Gavin Newsom declared a State of Emergency in the State of California; and

**WHEREAS** in light of ongoing concerns about public health and safety, on March 17, 2020, Governor Newsom issued Executive Order N-29-20, which suspended certain provisions of the Ralph M. Brown Act (the “Brown Act”) in order to allow local government bodies to conduct open meetings safely during the coronavirus pandemic. On June 11, 2021, the Governor issued Executive Order N-08-21, extending the suspension of these provisions to allow local government bodies to continue to conduct their meetings remotely through September 30, 2021; and

**WHEREAS**, on September 10, 2021, the Legislature took additional action to allow local agencies to forego compliance with the Brown Act teleconferencing requirements under specific circumstances after the expiration of the Governor’s order by adopting AB 361, which amends the Brown Act’s requirements for teleconferencing during a proclaimed state of emergency and when certain other conditions are met and certain findings are made. Because the bill contained an urgency clause, it took effect upon Governor Newsom’s signature on September 16, 2021; and

**WHEREAS**, the Brown Act, as amended, allows local agencies to make an initial determination to hold open meetings via teleconferencing when there is a proclaimed state of emergency and any of the following circumstances exist:

1. State or local officials have imposed or recommended social distancing

2. The local agency holds a meeting for the purposed of determining by majority vote if meeting in person would pose imminent health and safety risks to attendees
3. The local agency holds a meeting after having determined by majority vote that, as a result of the emergency, meeting in person would pose imminent risks to the health or safety of attendees.

The local agency must reconsider whether the state of emergency continues to impact the ability of the members to meet safely in person or whether local or state officials continue to impose or recommend social distancing every 30 days; and

**WHEREAS** the rates of transmission of COVID-19 and variants, and to protect the health and safety of the public, the Workforce Development Board (WDB) of Madera County wishes to take the actions necessary to comply with the Brown Act, as amended and to continue to hold its Board meetings remotely via teleconference.

**NOW, THEREFORE, BE IT RESOLVED** that the WDB hereby finds that pursuant to the Governor's State of Emergency Declaration, issued on March 4, 2020, there is a proclaimed State of Emergency in the State of California; and

**BE IT FURTHER RESOLVED** that the WDB finds that meeting in person in the next 30 days would pose imminent health and safety risks to attendees; and

**BE IT FURTHER RESOLVED** that the WDB approves meeting vie teleconference for all Regular and Special and Regular meetings of the WDB for 30 days following this resolution, in accordance with the Government Code section 54953(e) and other applicable provisions of the Brown Act.

Regularly passed and adopted this 13<sup>TH</sup> day of January 2023 by the following vote:

AYES: 5

NAYES: 0

ABSENT: 0

  
\_\_\_\_\_  
Chair  
Workforce Development Board of Madera County

ATTEST:

  
\_\_\_\_\_  
Executive Director  
Workforce Development Board of Madera County

**RESOLUTION NO. 2021-01**

**WORKFORCE DEVELOPMENT BOARD OF MADERA COUNTY**

**ADOPTING FINDINGS THAT THERE IS A PROCLAIMED STATE OF EMERGENCY AND THAT MEETING IN PERSON POSES IMMINENT HEALTH AND SAFETY RISKS TO ATTENDEES AND AUTHORIZING REMOTE TELECONFERENCE MEETINGS FOR THE BOARD FOR THE PERIOD OF FEBRUARY 15, 2023, through MARCH 16, 2023**

**WHEREAS**, on March 4, 2020, Governor Gavin Newsom declared a State of Emergency in the State of California; and

**WHEREAS** in light of ongoing concerns about public health and safety, on March 17, 2020, Governor Newsom issued Executive Order N-29-20, which suspended certain provisions of the Ralph M. Brown Act (the “Brown Act”) in order to allow local government bodies to conduct open meetings safely during the coronavirus pandemic. On June 11, 2021, the Governor issued Executive Order N-08-21, extending the suspension of these provisions to allow local government bodies to continue to conduct their meetings remotely through September 30, 2021; and

**WHEREAS**, on September 10, 2021, the Legislature took additional action to allow local agencies to forego compliance with the Brown Act teleconferencing requirements under specific circumstances after the expiration of the Governor’s order by adopting AB 361, which amends the Brown Act’s requirements for teleconferencing during a proclaimed state of emergency and when certain other conditions are met and certain findings are made. Because the bill contained an urgency clause, it took effect upon Governor Newsom’s signature on September 16, 2021; and

**WHEREAS**, the Brown Act, as amended, allows local agencies to make an initial determination to hold open meetings via teleconferencing when there is a proclaimed state of emergency and any of the following circumstances exist:

1. State or local officials have imposed or recommended social distancing

2. The local agency holds a meeting for the purposed of determining by majority vote if meeting in person would pose imminent health and safety risks to attendees
3. The local agency holds a meeting after having determined by majority vote that, as a result of the emergency, meeting in person would pose imminent risks to the health or safety of attendees.

The local agency must reconsider whether the state of emergency continues to impact the ability of the members to meet safely in person or whether local or state officials continue to impose or recommend social distancing every 30 days; and

**WHEREAS** the rates of transmission of COVID-19 and variants, and to protect the health and safety of the public, the Workforce Development Board (WDB) of Madera County wishes to take the actions necessary to comply with the Brown Act, as amended and to continue to hold its Board meetings remotely via teleconference.

**NOW, THEREFORE, BE IT RESOLVED** that the WDB hereby finds that pursuant to the Governor's State of Emergency Declaration, issued on March 4, 2020, there is a proclaimed State of Emergency in the State of California; and

**BE IT FURTHER RESOLVED** that the WDB finds that meeting in person in the next 30 days would pose imminent health and safety risks to attendees; and

**BE IT FURTHER RESOLVED** that the WDB approves meeting vie teleconference for all Regular and Special and Regular meetings of the WDB for 30 days following this resolution, in accordance with the Government Code section 54953(e) and other applicable provisions of the Brown Act.



Regularly passed and adopted this 9<sup>TH</sup> day of February 2023 by the following vote:

AYES: 3

NAYES: 0

ABSENT: 2

  
\_\_\_\_\_  
Chair  
Workforce Development Board of Madera County

ATTEST:

  
\_\_\_\_\_  
Executive Director  
Workforce Development Board of Madera County



# Executive Committee

## **SPECIAL MEETING**

## MINUTES

**January 13, 2023**

*Convened at Madera County Workforce Assistance Center – via Teleconference  
2037 W. Cleveland Avenue, Madera, CA 93637*

Zoom Meeting: <https://us02web.zoom.us/j/82750028123?pwd=RVRQR3dTNTN0RkZod054SGxTbWQ1dz09>  
Phone: 1-669-900-9128; Meeting ID: 827 5002 8123; Password: 766587.

**PRESENT:** Brett Frazier, Pat Gordan, Omair Javaid, Nichole Mosqueda, Robert Poythress

**ABSENT:**

**GUEST:**

**STAFF:** Nicki Martin, Maiknue Vang

### **1.0 Call to Order**

*Meeting called to order at 8:32 a.m. by Chair Brett Frazier.*

#### **1.1 Pledge of Allegiance**

### **2.0 Additions to the Agenda**

*None.*

### **3.0 Public Comment**

*None.*

### **4.0 Introductions and Recognitions**

*None.*

### **5.0 Adoption of Board Agenda**

*Nichole Mosqueda moved to adopt the agenda, seconded by Pat Gordan.*

*Vote: Approved – unanimous*

*Yes: Brett Frazier, Pat Gordan, Omair Javaid, Nichole Mosqueda, Robert Poythress*

### **6.0 Consent Items**

#### **6.1 Consideration to reaffirm Resolution 2021-01 authorizing remote teleconferencing for the period of January 16, 2023, through February 14, 2023, in accordance with Assembly Bill 361.**

*Pat Gordan moved to approve, seconded by Nichole Mosqueda.*

*Vote: Approved – unanimous*

*Yes: Brett Frazier, Pat Gordan, Omair Javaid, Nichole Mosqueda, Robert Poythress*

**7.0 Action Items**

*None.*

**8.0 Next Meeting**

*To be determined.*

**9.0 Adjournment**

*Meeting adjourned at 8:35 a.m.*



# Executive Committee

## SPECIAL MEETING

### MINUTES

**February 9, 2023**

*Convened at Madera County Workforce Assistance Center – via Teleconference  
2037 W. Cleveland Avenue, Madera, CA 93637*

Zoom Meeting: <https://us02web.zoom.us/j/82750028123?pwd=RVRQR3dTNTN0RkZod054SGxTbWQ1dz09>  
Phone: 1-669-900-9128; Meeting ID: 827 5002 8123; Password: 766587.

**PRESENT:** Brett Frazier, Pat Gordan, Omair Javaid

**ABSENT:** Nichole Mosqueda, Robert Poythress

**GUEST:**

**STAFF:** Nicki Martin, Maiknue Vang, Tracie Scott-Contreras

#### **1.0 Call to Order**

*Meeting called to order at 11:30 a.m. by WDB Chair Brett Frazier.*

##### **1.1 Pledge of Allegiance**

#### **2.0 Additions to the Agenda**

*None.*

#### **3.0 Public Comment**

*None.*

#### **4.0 Introductions and Recognitions**

*None.*

#### **5.0 Adoption of Board Agenda**

*Pat Gordan moved to adopt the agenda, seconded by Omair Javaid.*

*Vote: Approved – unanimous*

*Yes: Brett Frazier, Pat Gordan, Omair Javaid*

#### **6.0 Consent Items**

##### **6.1 Consideration to reaffirm Resolution 2021-01 authorizing remote teleconferencing for the period of February 15, 2023, through March 14, 2023, in accordance with Assembly Bill 361.**

*Staff stated that the time frame as listed on the agenda for the resolution was incorrect. The time frame should have been for the period of February 15, 2023, through March 16, 2023.*

*Pat Gordan moved to approve the resolution with the revised time frame, seconded by Omair Javaid.*

*Vote: Approved – unanimous*

*Yes: Brett Frazier, Pat Gordan, Omair Javaid*

**7.0 Action Items**

*None.*

**8.0 Next Meeting**

*To be determined.*

**9.0 Adjournment**

*Meeting adjourned at 11:35 a.m.*



## MINUTES

**December 15, 2022**

***Convened at Madera County Workforce Assistance Center and via Teleconference  
2037 W. Cleveland Avenue, Madera, CA 93637***

**Zoom Meeting:** <https://us02web.zoom.us/j/81274206285?pwd=enROTMo3RTRidG5EcnhTM2Y2TXRWdz09;>  
**Phone: (669) 900-9128; Meeting ID: 812 7420 6285; Password: 274155**

**PRESENT:** Brett Frazier, Chuck Riojas, Darren Rose, Debi Bray (7.1), Joe Perez, Jorge DeNava, Ladislao Lopez, Lanie Suderman, Laura Gutile, Mike Lopez, Nichole Mosqueda, Omair Javaid, Robert Poythress, Wendy Lomeli

**ABSENT:** Cindy Vail, Deborah Martinez, Dr. Lucia F. Robles, Joseph Giles, Mark Choe, Mattie Mendez, Michelle Brunetti, Mike Fursman

**GUEST:** Amelia Meza, David Shinder, Donald Foster, Gary Beaudette,

**STAFF:** Bertha Vega, Jessica Roche, Maiknue Vang, Nicki Martin, Tracie Scott-Contreras

### **1.0 Call to Order**

*Meeting called to order at 3:10 a.m. by WDB Chair Brett Frazier.*

#### **1.1 Pledge of Allegiance**

### **2.0 Additions to the Agenda**

*None.*

### **3.0 Public Comment**

*None.*

### **4.0 Introductions and Recognitions**

*None.*

### **5.0 Adoption of Board Agenda**

### **6.0 Consent Calendar**

- 6.1 Ratification of approval of Resolution 2021-01 authorizing remote teleconferencing for the period of November 17, 2022, through December 15, 2022, in accordance with Assembly Bill 361.**
- 6.2 Consideration of approval of Resolution 2021-01 authorizing remote teleconferencing for the period of December 16, 2022, through January 15, 2022, in accordance with Assembly Bill 361.**
- 6.3 Consideration of approval of the November 7, 2022, Workforce Development Board (WDB) Executive Committee meeting minutes.**
- 6.4 Consideration of approval of the October 20, 2022, WDB meeting minutes.**
- 6.5 Consideration of approval of the revised Debt Collection policy which replaces the Workforce Investment Act (WIA) with the Workforce Innovation and Opportunity Act (WIOA) and includes state-imposed requirements which are indicated by *bold, italic* type.**
- 6.6 Consideration of approval of the revised Audit Resolution policy which replaces WIA with WIOA and includes state-imposed requirements which are indicated by *bold, italic* type.**
- 6.7 Consideration of approval of the resignation of Cindy Vail, Vail Insurance, from the WDB.**

*Laura Gutile moved to approve the consent calendar, seconded by Omair Javaid.*

*Vote: Approved – Unanimous*

*Yes: Brett Frazier, Chuck Riojas, Darren Rose, Debi Bray (7.1), Joe Perez, Jorge DeNava, Ladislao Lopez, Lanie Suderman, Laura Gutile, Mike Lopez, Nichole Mosqueda, Omair Javaid, Robert Poythress, Wendy Lomeli*

## **7.0 Action Items**

### **7.1 Consideration of approval of the WDB of Madera County Local Workforce Plan PY 2021-24 Two Year Modification to include WDB Chair signature and authorization for staff to forward to the county local elected official (CLEO) for approval and signature.**

*Staff have been working with David Shinder, a consultant, on the Local Plan 2-year modification. The plan is due to the State by March 31, 2023. A draft copy of the agenda is provided for review and approval. The plan will be provided to the public during a 30-day public comment period beginning January 4, 2023. If there are no public comments or changes to the plan, it will be submitted to the Board of Supervisors for approval. The Plan will be brought back to the WDB at their February 2023 meeting if comments are submitted or if there are significant changes made to the Plan. David Shinder provided information on the workforce plan and the process that goes into the development of the modification. The Workforce Innovation and Opportunity Act (WIOA) requires that local workforce boards develop strategic plans every 4 years. Federal requirements state that the workforce plans be updated at the halfway point – 2 years after approval of the local plan. Staff and David did a comprehensive review of the plan to make sure that it's as current as possible and also to recalibrate the local forecasting in order to make sure that projections were as accurate as possible. Staff also made sure to engage and include input from the members of the community, partners and community stakeholders via forums. 3 sessions were held – 1 in person and 2 virtually. The first topic asked for input regarding what the role of the workforce system is in terms of recovery. The remaining 2 sessions focused on business needs and job seeker needs. The information gathered from the sessions was embedded into the modification. Short summaries of progress made with the plan were inserted into the existing plan as part of the modification. Staff spent a significant amount of time reviewing the plan and adding information around services that may have changed, new partnerships or changes to existing partnerships, and new projects that may have started. Staff start working on a new plan approximately 1 year before the current plan expires. The current plan goes through June 30, 2025. David commended Tracie, Maiknue and staff for the excellent work they are doing.*

*Laura Gutile moved to approve, seconded by Omair Javaid.*

*Vote: Approved – unanimous*

*Brett Frazier, Chuck Riojas, Darren Rose, Debi Bray, Joe Perez, Jorge DeNava, Ladislao Lopez, Laura Gutile, Mike Lopez, Nichole Mosqueda, Omair Javaid, Robert Poythress, Wendy Lomeli*

### **7.2 Consideration of approval of the final local area negotiated performance goals for program years 2022-23 and 2023-24.**

*Staff presented the final negotiated performance goals for the program years 2022-23 and 2023-24. Local areas are required to negotiate performance goals every 2 years. Staff had a call with the State in September 2022. Goals are based on several items such as the Statistical Adjustment Model (SAM) for the area, the State's negotiated performance goals as well as previous performance results. The State was focusing on increasing median earnings and credential attainment. Information on Madera's previous performance outcomes as well as the negotiated goals was reviewed. Some of Madera's proposed goals were accepted but the majority of the final goals were higher than proposed. Staff are confident that they will be able to meet or exceed the goals. Local areas can be placed on improvement plans if they don't meet the same goal 2 years in a row. Goals are considered met if the metric is 90% or higher.*

*Debi Bray moved to approve, seconded by Nichole Mosqueda.*

*Vote: Approved – Unanimous*

*Yes: Brett Frazier, Chuck Riojas, Darren Rose, Debi Bray, Joe Perez, Jorge DeNava, Ladislao Lopez, Lanie Suderman, Laura Gutile, Mike Lopez, Nichole Mosqueda, Omair Javaid, Wendy Lomeli*

**7.3 Consideration of approval of Beaudette Inc.'s One Stop Operator (OSO) report for the period of July 1, 2022, through September 30, 2022.**

*Gary Beaudette provided a review of the OSO report for the period of July 1, 2022, through September 30, 2022. The Workforce Partners meet monthly via Zoom and focus on aligning and integrating programs and updating each other. The Partners discuss what they are working on and try to set goals. Gary wants to gather data to share with the partners. Data will help Partners goal setting. Attendance for the Partner Meetings has been good. Everyone is working on cross-training videos. Internal and external communications is going to be the next focus point. Work is going into using the Unite Us program and checking to see who is using it. A goal is to get everyone to use a single referral system so that participants and businesses don't get lost in the process. Many partners are reaching their goals.*

*Laura Gutile moved to approve, seconded by Omair Javaid*

*Vote: Approved – Majority*

*Yes: Brett Frazier, Chuck Riojas, Darren Rose, Joe Perez, Jorge DeNava, Ladislao Lopez, Laura Gutile, Mike Lopez, Nichole Mosqueda, Omair Javaid, Wendy Lomeli*

*Abstain: Debi Bray*

**7.4 Consideration of approval of the application of Donald Foster, Golden Valley Chamber of Commerce, to the WDB for a 3-year term.**

*Donald Foster was nominated by the Golden Valley Chamber of Commerce and will represent the Madera Ranchos area on the WDB. Donald has lots of experience in the Ranchos area. He has worked as an Executive Chef and was transferred into the area. He has worked at Table Mountain Casino in the past before starting his own business.*

*Laura Gutile moved to approve, seconded by Darren Rose.*

*Vote: Approved – Unanimous*

*Yes: Brett Frazier, Chuck Riojas, Darren Rose, Debi Bray, Joe Perez, Jorge DeNava, Ladislao Lopez, Laura Gutile, Mike Lopez, Nichole Mosqueda, Omair Javaid, Wendy Lomeli*

**8.0 Information Items**

**8.1 Internal Tracking of Equity Outcomes Update**

*Information provided within the agenda packet. Previously, the WDB asked staff for information on how participant performance would be tracked. An example of the type of data that came be pulled for performance reports was provided.*

**8.2 Madera County Workforce Investment Corporation (MCWIC) Update**

*Information provided within the agenda packet. The MCWIC minutes and agenda were provided for the board's review.*

**8.3 WIOA Formula Quarterly Budget and Program Overview as of September 2022**

*Information provided within the agenda packet. The quarterly budget and program overview through the end of September 2022 was reviewed.*

**8.4 Information on Weekly Unemployment Insurance (UI) Initial Claims for Madera County**

*Information provided within the agenda packet. There was a bit of an uptick the week ending December 3, 2022. There will be some impacted individuals when Pak N Save closes. Staff have already worked with the employee from Sugar Pine restaurant.*

**9.0 Written Communication**

*None.*

**10.0 Open Discussion/Reports/Information**



### **11.1 Board Members**

- *Brett Frazier thanked staff for providing data to the WDB.*

### **11.2 Staff**

- *Maiknue Vang stated that there will be a retirement celebration for Tracie on February 23, 2023 – Save the Date!*

### **11.0 Next Meeting**

*February 16, 2023*

### **12.0 Adjournment**

*Meeting adjourned at 4:17 p.m.*

2023 Biennial Modification

2021 - 2024

# REGIONAL PLAN

contact: Adolph Lopez, Regional Organizer  
email: [sjvac@stanworkforce.com](mailto:sjvac@stanworkforce.com)  
phone: (209) 558-2100

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|                                     |
|-------------------------------------|
| <b>I. INTRODUCTION AND OVERVIEW</b> |
|-------------------------------------|

With the passage of the Workforce Innovation and Opportunity Act (WIOA) of 2014, Congress moved the national workforce system in a new direction in terms of how to approach economic and labor market demands. While establishment of local workforce areas over the last four decades has always taken into account local labor markets, WIOA recognizes that economies tend to be regional, spilling easily over jurisdictional boundaries that commerce finds inconsequential. WIOA's recognition of regional economies gave rise to California's establishment of Regional Planning Units (RPUs), which represent groups of local workforce areas that work collaboratively to develop strategies reflecting regional economic needs of business and the workforce. In accordance with federal and state guidance, the San Joaquin Valley and Associated Counties RPU has developed this four-year Regional Plan to guide strategic initiatives throughout Program Years (PY) 2021-24, which covers June 1, 2021 through June 30, 2025. WIOA requires a Biennial Modification to the Regional Plan. This 2023 version of the Plan serves as the required update and, once approved by state officials, will become the official version of the PY 21-24 Regional Plan from July 1, 2023 through June 30, 2025.

### ***Overview of the SJVAC RPU and the Region***

The parties to the Regional Plan are the eight local workforce development boards (WDBs) within the RPU, which include seven boards representing single counties (Fresno, Kings, Madera, Merced, San Joaquin, Stanislaus, and Tulare) and one consortium board representing three counties (Kern, Inyo and Mono). Through their Central California Workforce Collaborative (CCWC) network, the WDBs were all actively involved in the regional planning process by reviewing State guidance, selecting consultants to assist in the process, providing resource documents, organizing regional forums, and meeting as a group to share insights, make decisions, and establish priorities for regional coordination. As the designated lead for the RPU, development of the original PY 2021-24 Regional Plan was managed by the Stanislaus County WDB. Preparation of the 2023 Biennial Modification to the PY 21-24 Regional Plan has once again been led by representatives of Stanislaus County and has included significant contributions by all eight local boards.

The boundaries of the RPU are those defined by the ten counties referred to above. The area comprises approximately 40,760 square miles, roughly 25% of California. With a population quickly approaching nearly 4.3 million, the region is more populous than 25 states.

### ***Guiding Principles***

The SJVAC Regional Plan acknowledges and supports the vision for workforce system that is described in California's PY 2020-23 Unified Strategic Workforce Development Plan, the overarching state policy document. The State Plan's policy objectives have been

developed in collaboration with local boards and WIOA partners and communicates California's intent to create a comprehensive system that impacts poverty, promotes income mobility, and embeds equity as a cornerstone of service-delivery.

The plan is built upon six principles, which represent the values, vision, and commitment of the Central Valley's workforce stakeholders. They include:

Support for the Goals of the State Plan: Workforce preparation and economic prosperity are inextricably linked. The State Plan requires approaches that provide opportunities for all Californians to develop in-demand skills, thereby ensuring that industry has the talent it needs to succeed.

The Workforce System is Demand-Driven: Industry drives job demand and businesses define skills needed for jobs. It is the obligation of the workforce system to train candidates in these skills, preparing them for careers.

Regional Sector Pathways are an Effective Approach to Meeting Demand: Structured, high-quality education, training, and support programs offer opportunities for success for everyone who is preparing for a career.

The Workforce System Encompasses All Stakeholders: The system is not merely WIOA programs. Rather, it is comprised of the work, resources, and unique capabilities of all organizations and individuals with a stake in building and maintaining a prosperous, competitive economy.

Long-Term Regional Collaboration: The Central California Workforce Collaborative (CCWC) is a manifestation of a partnership that has existed for nearly 40 years. Through the joint efforts of the eight WDBs, this collaboration has yielded many benefits.

Economic Recovery is a Regional Workforce System Priority: In many ways, this four-year plan is a Recovery Plan. The region, and the local boards it represents, have never faced a task more daunting or more important. Agility, innovation, and perseverance will be required to ensure that businesses and job seekers thrive during to be an inconsistent economic recovery. The Workforce Development Boards of the Central Valley are committed to this goal.

While circumstances have vastly improved since the development of the original PY 21-24 Regional Plan, the 2023 update reaffirms the region's commitment to the foregoing principles.

### ***Approach to and Context for Plan Development***

To support development of the original PY 21-24 Plan, the region contracted with experienced workforce and economic development subject matter experts to design the stakeholder engagement process, analyze labor market and workforce data, facilitate community forums, and craft the language of the plan. Local board directors, managers,

and staff were active during every stage of the Plan development. One of the consultants that contributed to the original Plan was reengaged to support development of the update.

While this version of the Plan represents the 2023 biennial modification, review of the Plan requires an understanding of the context in which it was initially developed. Therefore, the following information is retained from the original version.

The Pall of the Pandemic: The onset of COVID-19 was not merely a factor in the development of the Plan, it was the core factor. The Pandemic profoundly impacted workforce system operations, staffing, communications, and relationships, along with the overall capacity of workforce professionals, system stakeholders, businesses, and residents to easily contribute to the Plan. Still, as local boards faced the prospect of developing a new four-year Plan for the region, workforce leaders proceeded with purpose, recognizing their obligation to chart a course forward.

The development of the Regional Plan in 2021 led Central Valley workforce system leaders to take stock of projections for recovery from authorities such as Dr. Nicholas Christakis of Yale University, a renowned physician and social scientist who has studied the course of pandemics throughout history. Dr. Christakis suggests that pandemics are experienced across three phases: immediate, intermediate and post-pandemic. In the case of COVID-19, the immediate phase began in the U.S. March of 2020. It is where we experience the biological shock of the virus and where shutdowns occur. With the availability of vaccines and progression toward herd immunity, this phase is expected to last through 2021. The intermediate phase, which may last through 2023, is where recovery begins to take hold and where communities, labor markets, and individuals continue to experience lingering psychological, social, and economic effects of the virus. The post-pandemic phase, which Dr. Christakis expects by 2024, will signal a return to “normal,” with the caveat that pandemics often result in profound and lasting changes. While we have seen some of the region’s businesses and workers experience economic recovery more quickly than expected, RPU leadership recognizes that recovery is ongoing.

Extensive Engagement with Stakeholders and the Community: The region relied heavily on input from workforce system stakeholders during the development of the SJVAC RPU PY 2017-20 Plan and its 2019 modification. Because of the sweeping effects of the public health crisis brought on by COVID-19, engagement with system partners, other stakeholders, and the community took on even greater significance during the development of the original PY 21-24 Regional Plan. In collaboration with local board leadership, our consultants held a series of “forums” that engaged participants in discussions on topics about which they had unique insights. The forums posed questions aimed at eliciting responses to inform the content of the Plan and the direction of regional strategies over the next four years. Questions posed to stakeholders in 2021, included, but were not limited to, the following:

- What Central Valley industries have been most affected by the pandemic?
- Which worker groups have been most impacted by the effects of pandemic - inexperienced/new workers, older workers, English language learners, others?

- For Valley residents, what are the main barriers to securing employment in jobs that pay middle class wages?
- What services are needed to put job seekers on a path to the middle class?
- Are some populations underserved by the workforce and education systems?
- What strategies or approaches could we pursue to make services more accessible and more appropriate for underserved populations?
- How could system partners better collaborate on improving services for vulnerable populations?
- What roles should the workforce system partners (business, education, workforce development boards and others) play in ensuring that career pathway training is developed and implemented?

In developing the Plan's Biennial Modification, the region again engaged stakeholders and the community in critical conversations regarding key workforce issues.

Responses were remarkable in their depth, insight, and ingenuity. The RPU's PY 2021-24 Plan concludes with a series of regional "priority considerations" for the next four years, the majority of which were recommended by stakeholders during the community engagement process. These priorities have been updated as part of the biennial modification.

Coupling Data Analysis with Anecdotal Information: The regional partners believe that the labor market and workforce data analysis presented in this plan is sound. However, the onset of the pandemic created many uncertainties with regard to projections that the data would typically suggest. Therefore, the content of the original PY 21-24 plan (particularly the priorities presented in Section VII and the "forecasting" narrative below), drew extensively from not just data analysis, but information, largely anecdotal, provided by system stakeholders. The update does as well.

### ***Forecasting the Work Ahead***

The Central Valley, along with the nation and the world as a whole, has seen an unprecedented number of economic, labor market, workforce, social, and cultural changes as the result of the pandemic that will continue to affect every aspect of life, including the activities and focus of the workforce system. While precise changes are unknown, global experts, national leaders in the field of workforce development, and regional system stakeholders have suggested such changes may include the following:

How We Work: A 2021 report from the McKinsey Global Institute predicted that 20 percent of workers could end up working from home indefinitely. How this will ultimately affect commercial real estate, work hours, teamwork, hiring, and a range of other factors that remain to be seen.

Where We Live: If it is not necessary for workers to be within a commutable distance to an office or other workplace, they could, essentially, live anywhere. For instance, workers employed by Bay Area or Southern California companies are living in the Central Valley.

Should local workforce agencies expand their outreach to businesses outside the SJVAC region?

How We Learn: With thousands of Central Valley residents having participated in and warmed to distance learning, what are the implications for training that should be available through the workforce system? Should a greater number of online and hybrid training programs and courses be made available?

Need for Cross-Cutting Skills: While economists believe that, over time, the U.S. will employ the same overall number of people as pre-pandemic, they predict that the specific work that people do is likely to change. Under that scenario, an emphasis on skills used across sectors and jobs (e.g., information technology, verbal and written communication, math and accounting, critical thinking) is more important than ever.

A Race to End the Digital Divide: With services of all kinds having become increasingly virtual during the pandemic, spending a significant part of our daily lives online is likely here to stay. To ensure that all individuals can participate in the region's workforce development services, government, business, philanthropy, and others must devise strategies to ensure access to broadband, hardware, and digital literacy skills.

Rapid Automation of Jobs: David Autor of MIT indicates that business automation is accelerating during the pandemic and that "once robots are in place, we won't go back." An example he cites is the following. In October 2020, Chewy, an online pet food and supply company, opened its first fully automated fulfillment center in Archbald, PA. The facility employs approximately 10% of those working at other Chewy warehouses.

Shuttered Businesses/Lost Jobs: Economists warned that millions of jobs lost during the pandemic, including those at hotels and restaurants, were unlikely to come back. While a substantial percentage of businesses have re-opened, many are getting by with fewer staff.

Main Street in Peril: Small businesses have been hit especially hard by the pandemic, as they generally have fewer resources to take them through hard times. Minority-owned businesses experienced significant losses in the Central Valley, as their customer bases have been disproportionately affected by the pandemic.

Decline in Business Travel: In November 2020, Microsoft founder-turned-philanthropist Bill Gates predicted that half of business travel would go away forever. While travel, overall, has rebounded, much business-related travel continues to be foregone in favor of teleconferencing.

Less Brick-and-Mortar Retail: Online retail boomed during the pandemic and in-person retail businesses (which were already in decline) throughout the region closed in record numbers. Beyond store employees, people working in security, maintenance, real estate, and other occupations have lost their jobs as the result of store closures.



Lost Skills: Thousands of Central Valley workers who were unemployed for many months or longer, may have lost skills while away from work. The retraining of such workers is still being determined.

A Stalled Generation: Some high school and college students who were forced to quickly shift to online learning during the pandemic reported learning at a slower pace with less rigorous curriculum than in traditional classrooms, resulting in possibly higher GPAs for doing less work. Learning outside traditional school settings, students also had fewer opportunities to develop social skills. Are these individuals prepared to enter the workforce? Will they ever be as fully prepared as necessary?

Just-in-Time Expectations: Many businesses have slowly made their way back. As opportunities for growth have become available, many companies have found themselves in need of employees on short notice. The workforce system must continue to implement strategies to quickly and efficiently source talent to these businesses.

A Growing Equity Consciousness: The expectations of the nation are that all endeavors will commit to equity, diversity, inclusion, and access for everyone. Will a changing and, possibly, unstable labor market make this commitment more challenging?

Impact of Climate Initiatives on Jobs: As government and business attempt to minimize the impacts of climate change on the environment, will some traditional jobs be lost as a result?

A Field Day for Entrepreneurship: As businesses have expanded, so have opportunities for entrepreneurs seeking to start new businesses. Is the workforce system prepared to support these efforts?

Lingering Effects of the Pandemic: As the biennial update to the Plan has been developed, regional leaders have been able to approach planning with more clarity. Still much remains unknown. What will be the ongoing effects of the pandemic on workers, businesses, and the economy? The workforce system is likely to be in a constant state of planning and pivoting over the course of this Regional Plan.

While the foregoing list of actual and potential changes resulting from the pandemic is far from comprehensive, these issues highlight the need for local workforce systems and regional initiatives to be agile, prepared to quickly change course, and capable of taking on challenges both familiar and never before seen. Priorities for consideration by regional workforce leaders and system stakeholders are summarized in Section VII of this plan.

## **II. ANALYTICAL OVERVIEW OF THE REGION**

The Regional Plan for the Central Valley provides an overview of the region's economy and workforce environment and describes collaborative strategies across the eight local workforce development areas. Leveraging external and internal expertise, the SJVAC RPU has completed an analysis of the economic conditions and trends in the region as well as an analysis of the current workforce.

In the Fall of 2020, shortly after the State issued preliminary guidance on the development of PY 2021-24 Regional and Local Plans, Stanislaus County WDB, on behalf of the region, competitively procured the services of Resource Development Associates (RDA), a company specializing in research and analysis, particularly for the public sector, to conduct labor market and workforce analysis in areas required for regional planning. In February 2021, RDA published the results of this analysis in its ["San Joaquin Valley Regional Planning Unit Data Analysis"](#). The analysis in its entirety is accessible through the preceding hyperlink.

For the 2023 Biennial Modification to the PY 21-24 Regional Plan, Stanislaus County WDB representatives took responsibility for updating data presented in the original plan, utilizing sources, processes, and formats from RDA's analysis.

### ***Introduction to the Updated Analysis***

This version of the SJVAC RPU Regional Plan updates data incorporated into the original. Data tables and figures to be updated were chosen in alignment with state guidance regarding the two-year modification of the Regional Plan, which requests that the analytical overview of the region address:

1. Current employment and unemployment data.
2. Current educational and skill levels of the workforce, the current needs of employers in the region, and any relevant skill gaps between the two.
3. Industries and occupations with an emerging demand.

To update the data tables and figures, Lightcast and JobsEQ were used. Both are software that provide access to labor market data through various data sources, including, but not limited to, the Bureau of Economic Analysis, the Bureau of Labor Statistics, and the Census Bureau. Data was collected specifically for SJVAC RPU. Lightcast and JobsEQ reports were supplemented with data from the American Community Survey through the Census Bureau.

### ***Forecast Considerations***

After two years of COVID-19, California's economy is rebounding and shifting back to pre-pandemic conditions. Throughout 2021, the Central Valley and California experienced a declining unemployment rate and, by December 2021, the SJVAC RPU unemployment rate (not seasonally adjusted) had lowered to 5.3%. Despite this positive

economic trend, inflationary pressures continue with consumers experiencing higher prices with the year-over-year CPI inflation hitting a 40-year high of 9.1% in June 2022.<sup>1</sup> The initial shift of nearly two-thirds of the US workforce to remote settings resulted in unevenly distributed impacts across workers, employers, industries, and regions<sup>2</sup>. Remote work is expected to continue with current research suggesting that 20 percent of full workdays will be supplied from home after the pandemic ends, compared with just 5 percent before.<sup>3</sup>

Typically, during a recession, economic models look to past recessions with similar characteristics to forecast the recession's impact on employment, labor market, and industry trends and economic impacts. However, this recession was driven by a public health crisis rather than typical market drivers. This allowed for a relatively rapid economic recovery. The forecasts provided in this document do include the COVID-19 recession as a variable and align with the general consensus that after 2022, economic growth slows, and inflationary pressures ease<sup>4</sup>. This is not to say that the SJVAC RPU's economic data fully depicts the challenges the region has experienced since March 2021 or can predict with absolute certainty how the recovery across the Central Valley will play out. It will likely take years to fully understand how this pandemic has impacted and transformed the local, regional, and state labor markets and workforce.

### **Analysis of Employment and Unemployment Data**

SJVAC RPU's unemployment rates were in a downward trend in 2021, on par with the unemployment rate across the State. The SJVAC RPU unemployment rate went from 8.5% in January 2021 to 5.3% in December 2021. The California unemployment rate went from 9.2% in January 2021 to 4.8% in December 2021.

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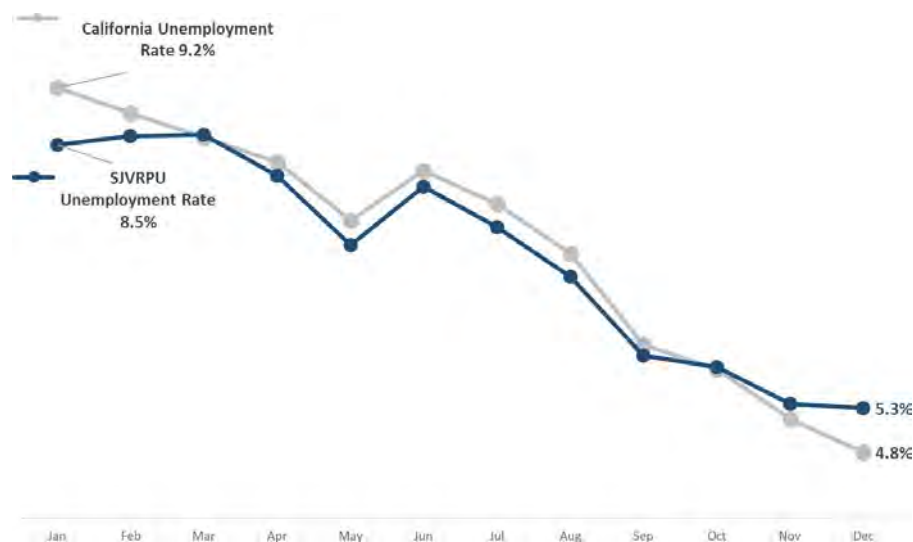
<sup>1</sup> Bureau of Labor Statistics, U.S. Department of Labor, The Economics Daily, Consumer prices up 9.1 percent over the year ended June 2022, largest increase in 40 years at <https://www.bls.gov/opub/ted/2022/consumer-prices-up-9-1-percent-over-the-year-ended-june-2022-largest-increase-in-40-years.htm> (visited December 16, 2022).

<sup>2</sup> Bloom, N. 2020. "How Working from Home Works Out". Stanford Institute for Economic Policy Research. Policy Brief. June 2020.

<sup>3</sup> Barrero, Jose, Nicholas Bloom and Steve Davis. "Why working from home will stick," National Bureau of Economic Research working paper 28731, April 2021.

<sup>4</sup> Congressional Budget Office. 2022. The Budget and Economic Outlook: 2022 to 2032. Retrieved December 12, 2022 from <https://www.cbo.gov/publication/57950>

**Figure 1. SJVAC RPU Monthly Unemployment Rate, 2021**



Source: BLS Local Area Unemployment Statistics, 2021. The data present is not adjusted for seasonality.

Table 1, below, provides an overview of 2021 unemployment rates by each of the SJVAC RPU's local workforce development areas. Unemployment is highest in Tulare County and lowest in Stanislaus County.

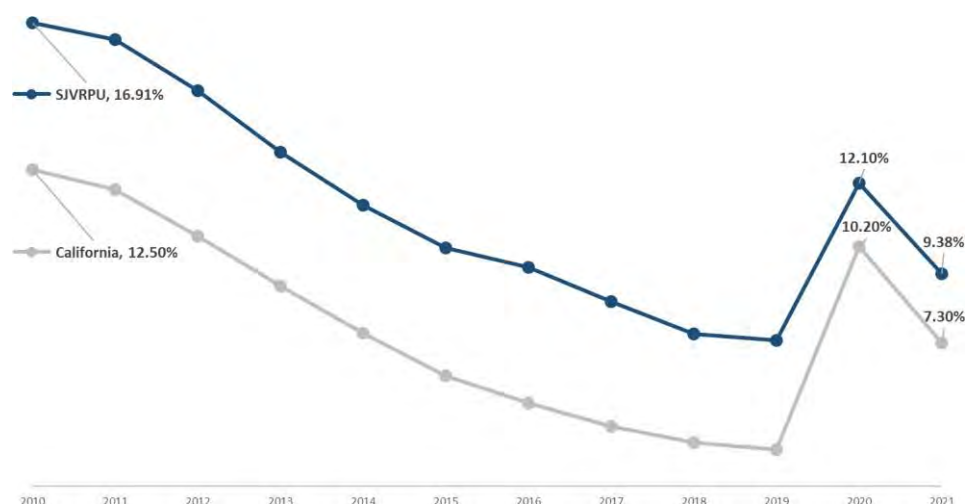
**Table 1: SJVAC RPU Unemployment Totals and Rates by Region (2021 Annual)**

| SJVAC RPU Local Region  | Total Unemployed | Unemployment Rate |
|-------------------------|------------------|-------------------|
| Tulare County           | 21,435           | 10.7%             |
| Merced County           | 11,935           | 10.4%             |
| Kern/Inyo/Mono Counties | 39,608           | 9.9%              |
| Kings County            | 5,386            | 9.6%              |
| Fresno County           | 40,741           | 9.2%              |
| Madera County           | 5,476            | 8.8%              |
| San Joaquin County      | 28,972           | 8.7%              |
| Stanislaus County       | 20,042           | 8.4%              |

Source: BLS Local Area Unemployment Statistics, 2021. The data present is not adjusted for seasonality.

SJVAC RPU currently and historically has a higher unemployment rate than the overall state. However, the gap in unemployment rates has lessened compared to 2010 levels. In 2021, there was a 2.08% difference compared to a 4.41% difference in 2010. The non-seasonally adjusted unemployment rate is likely higher due to the seasonality of work in the agriculture industry.

**Figure 2. SJVAC RPU Unemployment Rate 2010-2021**

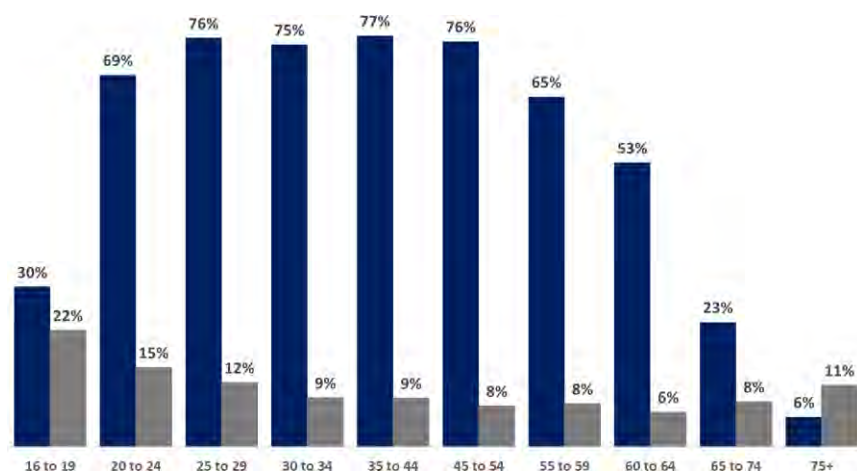


Source: BLS Local Area Unemployment Statistics, 2010-2021. The data present is not adjusted for seasonality.

Figure 3, below, depicts labor force participation and unemployment rates by age groups in 2021. Labor force participation by age group follows the typical bell curve where employment is expectedly low among youth (16-19) and young adults (20-24). Employment levels peak from ages 25 to 54 then begin to taper off at 55 with a considerable drop after age 64. Unemployment rates are highest among youth and young adults and decline as age increases.

Labor force participation is lowest for age groups 16-19, 65-74, and 75+ with labor force participation rates of 30%, 23%, and 6% respectively. Unemployment rates are highest in the younger age groups of 16-19, 20-24, and 25-29 with unemployment rates of 22%, 15%, and 12% respectively.

**Figure 3. SJVAC RPU Labor Force Participation and Unemployment by Age Group**



Source: ACS 1-Year Estimates 2021. Data unavailable for Inyo and Mono Counties.

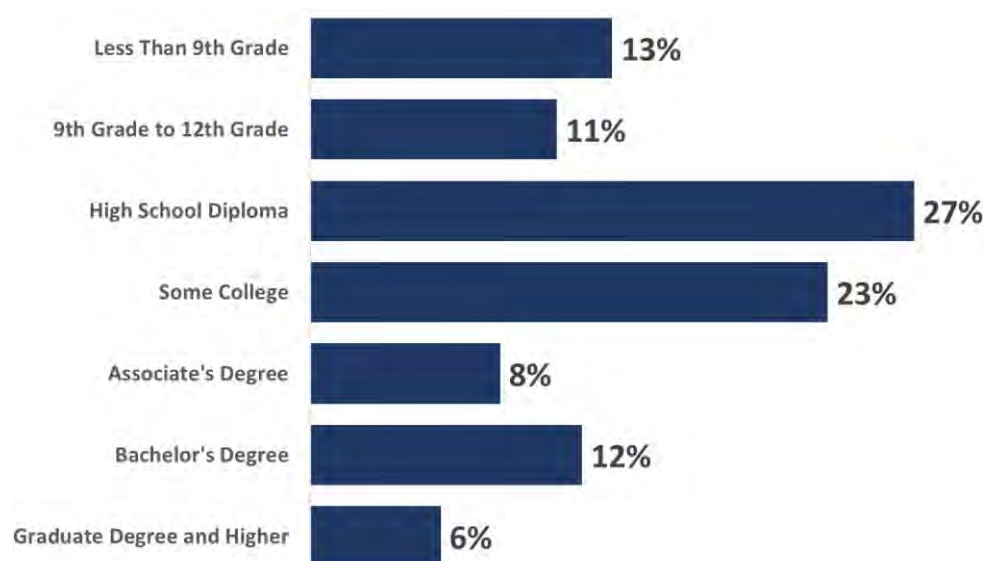
## Analysis of the Educational and Skill Levels of the Workforce, the Current Needs of Employers in the Region, and Relevant Skill Gaps

The analysis includes both an assessment of education and skills levels of the regional workforce and an assessment of employment needs.

To assess the education and skill levels of the workers in SJVAC RPU, demographic data from the American Community Survey (5-Year 2016-2020, 1-Year 2021), educational attainment data from Lightcast, and awards and skill gaps data from JobsEQ were utilized.

The majority of the region's population aged 25-64 have not been awarded a college degree (74%). Only 8% of the region's population aged 25-64 has earned associate degree, while 12% has earned a bachelor's degree and 6% has been awarded a postgraduate degree (see Figure 4).

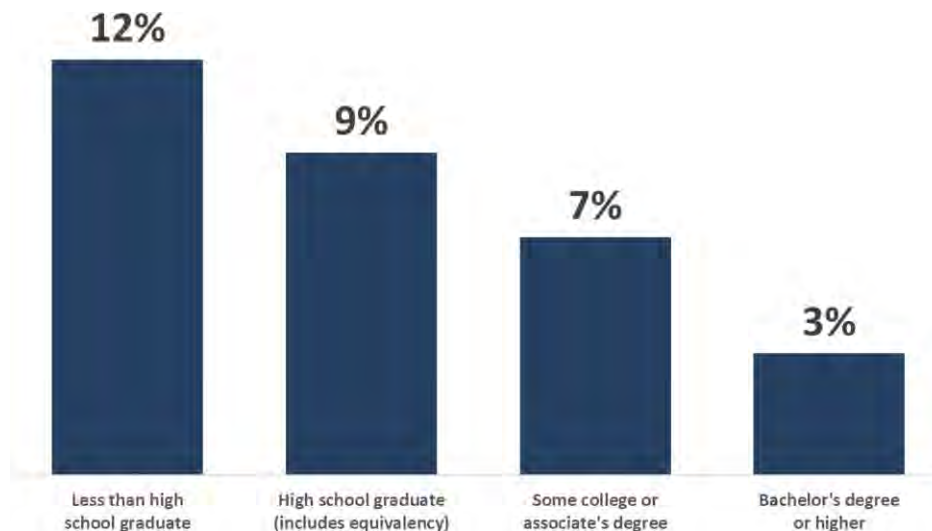
**Figure 4. SJVAC RPU Educational Attainment, Age 25-64**



Source: Lightcast Educational Attainment Snapshot (Q3 2022 Data Set)

The unemployment rate is highest among those who have less than a high school degree (12%) and lowest among those who have earned a bachelor's degree or higher (3%, see Figure 5)

**Figure 5. SJVAC RPU Unemployment Rate by Educational Attainment, Age 25-64**



Source: ACS 5-Year Estimates 2016-2020. Data unavailable for Inyo and Mono Counties.

Of the traditional college-aged population, those 18-24 years old, 64% are not enrolled in college or graduate school, 32% are enrolled in public school, and 4% are enrolled in private school (Figure 6).

**Figure 6. SJVAC RPU College/Graduate School Enrollment by Type, 18-24 Years**



Source: ACS 1-Year Estimates 2021. Data unavailable for Inyo and Mono Counties.

### ***Assessment of Employment Needs within the Region***

To assess employment needs, we measured occupational, skill, and awards gaps projected across the SJVAC RPU's industries and occupations.

**Occupational gaps** are occupations where labor supply shortages are expected to occur. Gaps are calculated based on a forecast comparing occupation demand growth to the local population growth and the projected educational attainment of those residents. Employers across the SJVAC RPU are anticipated to experience gaps in workers for specific occupations as shown in Table 2. For example, healthcare practitioners and

individuals with skills in other technical healthcare occupations will be particularly hard to hire given existing shortages in the occupations and the level of education, training, certification, and licensure required for these roles. The largest awards gap in the region is for *Healthcare Practitioners and Technical Occupations* with an 1,836 gap.

Management roles also represent a large occupational gap and may also be difficult roles for employers to fill given that management roles are generally considered mid-career positions. Business and financial operations occupations; educational instruction and library occupations; and community and social service occupations are expected to have modest occupational gaps. These gaps may be difficult to fill given the training and education required for these roles. Installation, maintenance, and repair occupations gaps may be easier to fill given lower training and education requirements. Computer and mathematical occupations gaps may be easier to fill, as technological occupations offer a wide range of roles across various levels of skills and experience.

**Table 2. SJVAC RPU Potential Average Annual Occupation Gaps Over 5 Years**

| SOC     | Occupation                                     | Annual Supply Gap | Current Employment | Annual Growth Demand | Annual Sep Demand | Total Annual Demand | Projected Employment 2032 | Acc Supply 2027 | Acc Demand 2027 |
|---------|--|-------------------|--------------------|----------------------|-------------------|---------------------|---------------------------|-----------------|-----------------|
| 29-0000 | Healthcare Practitioners and Technical         | -769              | 88,906             | 1,240                | 5,199             | 6,439               | 101,311                   | 19,083          | 22,926          |
| 11-0000 | Management                                     | -691              | 106,275            | 1,410                | 9,285             | 10,695              | 120,375                   | 31,598          | 35,054          |
| 13-0000 | Business and Financial Operations              | -207              | 72,584             | 828                  | 6,419             | 7,247               | 80,861                    | 24,842          | 25,879          |
| 15-0000 | Computer and Mathematical                      | -171              | 25,025             | 353                  | 1,871             | 2,224               | 28,555                    | 6,692           | 7,547           |
| 49-0000 | Installation, Maintenance, and Repair          | -134              | 56,493             | 654                  | 5,650             | 6,304               | 63,033                    | 20,323          | 20,991          |
| 25-0000 | Educational Instruction and Library            | -109              | 105,851            | 1,086                | 9,513             | 10,599              | 116,715                   | 35,649          | 36,195          |
| 21-0000 | Community and Social Service                   | -65               | 31,951             | 600                  | 3,390             | 3,989               | 37,947                    | 13,105          | 13,432          |
| 17-0000 | Architecture and Engineering                   | -50               | 15,867             | 124                  | 1,190             | 1,314               | 17,103                    | 4,473           | 4,724           |
| 23-0000 | Legal  | -49               | 8,582              | 95                   | 581               | 676                 | 9,530                     | 2,011           | 2,254           |
| 19-0000 | Life, Physical, and Social Science             | -28               | 12,837             | 141                  | 1,222             | 1,363               | 14,244                    | 4,256           | 4,395           |
| 27-0000 | Arts, Design, Entertainment, Sports, and Media | -14               | 16,360             | 244                  | 1,740             | 1,985               | 18,803                    | 6,186           | 6,255           |
| 31-0000 | Healthcare Support                             | 33                | 92,590             | 3,137                | 13,583            | 16,720              | 123,959                   | 46,190          | 46,023          |
| 47-0000 | Construction and Extraction                    | 210               | 69,597             | 683                  | 7,069             | 7,752               | 76,428                    | 27,790          | 26,739          |



|         |   |       |         |       |        |        |         |        |        |
|---------|---|-------|---------|-------|--------|--------|---------|--------|--------|
| 33-0000 | Protective Service                            | 253   | 38,280  | 361   | 4,693  | 5,053  | 41,888  | 16,193 | 14,930 |
| 37-0000 | Building and Grounds Cleaning and Maintenance | 325   | 49,304  | 566   | 6,709  | 7,275  | 54,967  | 23,642 | 22,019 |
| 39-0000 | Personal Care and Service                     | 363   | 34,605  | 831   | 5,279  | 6,110  | 42,916  | 19,624 | 17,807 |
| 51-0000 | Production                                    | 579   | 82,838  | 502   | 9,515  | 10,017 | 87,858  | 36,879 | 33,983 |
| 45-0000 | Farming, Fishing, and Forestry                | 671   | 153,563 | 4,422 | 26,968 | 31,390 | 197,783 | 86,103 | 82,746 |
| 53-0000 | Transportation and Material Moving            | 1,117 | 192,338 | 2,707 | 25,565 | 28,272 | 219,409 | 91,017 | 85,430 |
| 43-0000 | Office and Administrative Support             | 1,189 | 160,241 | 250   | 17,481 | 17,731 | 162,741 | 67,372 | 61,428 |
| 35-0000 | Food Preparation and Serving Related          | 2,111 | 127,605 | 3,095 | 24,889 | 27,984 | 158,551 | 82,191 | 71,638 |
| 41-0000 | Sales and Related                             | 2,210 | 135,296 | 213   | 18,568 | 18,781 | 137,427 | 73,034 | 61,986 |

Source: JobsEQ Occupation Gaps (2022Q2)

**Skill gaps** are defined as the difference between the supply and demand for a skill. Positive gaps are surpluses of a skill and negative gaps represent a shortage of a skill. Skill supply is collected by JobsEQ from resume data; demand (openings) is collected from job ads.

Many of the in-demand skills in the SJVAC RPU are aligned to occupations where there is both current and forecasted demand. Microsoft Excel, Microsoft Office, and Spanish are in high demand because they are valued in multiple industries and occupational sectors (Table 3).

**Table 3. SJVAC RPU Gaps in Hard Skills for All Occupations**

| Skill                  | Number of Candidates | Number of Openings | Gap    |
|------------------------|----------------------|--------------------|--------|
| Spanish                | 5,736                | 10,526             | -4,791 |
| Microsoft Excel        | 11,028               | 14,342             | -3,315 |
| Microsoft Office       | 8,372                | 10,914             | -2,542 |
| Mathematics            | 3,321                | 5,170              | -1,848 |
| Caregiving             | 966                  | 2,521              | -1,555 |
| Teaching/Training, Job | 2,375                | 3,837              | -1,462 |
| Sprayers               | 352                  | 1,496              | -1,145 |
| Manufacturing          | 2,783                | 3,766              | -983   |
| Marketing              | 1,020                | 1,983              | -963   |

|  |       |       |      |
|--|-------|-------|------|
| Cash Registers                         | 3,829 | 4,686 | -857 |
| Point of Sale Systems (POS Systems)    | 1,533 | 2,321 | -789 |
| Retail Sales                           | 3,132 | 3,803 | -671 |
| Microsoft PowerPoint                   | 3,100 | 3,705 | -606 |
| Sales                                  | 3,779 | 4,290 | -511 |
| Presentation                           | 1,285 | 1,779 | -493 |
| Data Analysis                          | 564   | 1,026 | -463 |
| SAP                                    | 1,239 | 1,681 | -442 |
| Molecular Cloning                      | 42    | 425   | -383 |
| Customer Relationship Management (CRM) | 712   | 1,080 | -368 |
| Inventory Control                      | 1,311 | 1,672 | -361 |
| Polymerase Chain Reaction (PCR)        | 66    | 420   | -354 |
| Serving                                | 1,325 | 1,659 | -334 |
| Salesforce                             | 502   | 820   | -318 |
| Performance Management                 | 443   | 758   | -315 |
| Lean Six Sigma                         | 283   | 588   | -305 |

Source: JobsEQ Skill Gaps (2022Q2, Openings and candidate sample compiled in August 2021)

**Awards gaps** show the difference between the number of educational awards (which are post-secondary certificates or degrees) and the occupation demand in the region for which each award is required. Negative values represent a shortage of degrees being awarded to meet the demand for the occupation. The positive values represent the surplus of awards, indicating the number of awards is greater than the target range of demand.

Gaps also exist between the number of awarded degrees in the region and overall employment demand by occupation. Table 4 demonstrates the awards gaps that are forecasted for SJVAC RPU that will feed into the occupations that are in-demand. The target range includes the US Awards Benchmark and the Annual Demand. Healthcare practitioners and technical occupations will see an awards gap of 1,836 and business and financial operations occupations will see an awards gap of 942. There will be a surplus of awards granted that feed into life, physical, and social science occupations; arts, design, entertainment, sports, and media occupations; and community and social service occupations.

**Table 4. SJVAC RPU Awards Gaps (Two-Year Degree or Higher Only)**

| SOC     | Occupation                             | Award Gap | Awards | Annual Demand | US Awards Benchmark |
|---------|--|-----------|--------|---------------|---------------------|
| 29-0000 | Healthcare Practitioners and Technical | -1,836    | 2,425  | 4,396         | 4,261               |
| 13-0000 | Business and Financial Operations      | -942      | 2,377  | 6,862         | 3,319               |
| 17-0000 | Architecture and Engineering           | -315      | 841    | 1,265         | 1,156               |
| 15-0000 | Computer and Mathematical              | -38       | 1,185  | 1,911         | 1,223               |

|         |  |      |        |        |        |
|---------|--|------|--------|--------|--------|
| 43-0000 | Office and Administrative Support              | -36  | 31     | 130    | 67     |
| 31-0000 | Healthcare Support                             | -33  | 36     | 161    | 69     |
| 41-0000 | Sales and related                              | -20  | 0      | 354    | 20     |
| 39-0000 | Personal Care and Service                      | -18  | 0      | 45     | 18     |
| 49-0000 | Installation, Maintenance, and Repair          | -10  | 0      | 67     | 10     |
| 45-0000 | Farming, Fishing, and Forestry                 | -6   | 0      | 67     | 6      |
| 53-0000 | Transportation and Material Moving             | -3   | 1      | 38     | 4      |
| 11-0000 | Management                                     | 0    | 5,291  | 6,919  | 4,981  |
| 23-0000 | Legal  | 0    | 370    | 642    | 350    |
| 25-0000 | Educational Instruction and Library            | 0    | 7,758  | 8,026  | 6,760  |
| 33-0000 | Protective Service                             | 0    | 0      | 3      | 0      |
| 19-0000 | Life, Physical, and Social Science             | 80   | 1,712  | 1,319  | 1,632  |
| 27-0000 | Arts, Design, Entertainment, Sports, and Media | 434  | 1,703  | 1,269  | 1,111  |
| 21-0000 | Community and Social Service                   | 828  | 3,877  | 3,049  | 2,915  |
| 00-0000 | Total - All                                    | -294 | 27,605 | 36,523 | 27,899 |

Source: JobsEQ Award Gaps (2022Q2, excludes awards from online schools)

### **Analysis of Industries and Occupations with Existing and Emerging Demand**

This analysis takes into account both existing industry and occupational demand and demand that is emerging throughout the region.

#### ***Existing Demand***

To understand current demand across both industries and occupations, the following indicators were assessed:

- Percent employment (level of employment) demonstrates the portion of total employment by an industry or occupation for the SJVAC RPU and reflects the level of demand based on the proportion of employment in a given industry or occupational group.
- 5-year growth (job growth) shows the overall employment trend in an industry or occupational group. This measure uses historical employment data to calculate the total percent increase or contraction of employment in a specific industry or occupational group over a five-year period.
- Location Quotient is the measure of the relative size or concentration of the region's industries or occupational group's employment compared to the national average.

**Industries with Existing Demand:** In the SJVAC RPU, government, health care and social assistance are the industries with the highest percent employment; these industries have positive projected growth and a concentration of sector employment.

- *Healthcare and social assistance* is one of the largest employers in the region and will likely continue that trend based on historical growth and the expanding need for healthcare services that is being driven by both demographics, an aging population across the region, and a large expansion of access to healthcare insurance beginning in 2014 with the Affordable Care Act.
- *Transportation and warehousing*, while encompassing a smaller share of the workforce, has grown by 67% from 2016 to 2021 and has a higher concentration of workers compared to national trends. The growth in this sector is likely driven by the expansion of online shopping in the past decade.
- *Construction* accounts for about 5% of all jobs across the region and has grown 21% from 2016 to 2021, reflecting high demand. While the construction industry's LQ suggests a lower concentration of construction jobs in the region compared to the national averages, the high percentage of employment in the region and healthy growth point to an existing high demand for workers in this industry.
- The Government Industry<sup>5</sup> (public-sector establishments) which encompasses *public administration and education industries* account for a wide swath of the employment across the region (19%). Both industry sectors experience high employment, concentration of jobs, and job growth. As these industries are made up largely of directly or indirectly publicly led and funded agencies, services, and programs, growth in these sectors is heavily driven by tax revenues, demographics, and legislation.
- *Agriculture* makes up a large percentage (13%) of employment and the region has nearly thirteen times the number of workers compared to the national average. This is likely being driven by the San Joaquin Valley being one of the leading agricultural producing regions in the world. The low growth in agriculture is likely being driven by automation and technological advances that reduce the number of workers needed as well as geographic limitations on expansion of current agricultural output. Despite the low growth, the seasonality of agriculture employment combined with an outsized portion of total employment and LQ indicates that there is employment demand.
- Data from the *Manufacturing industry* suggests moderate to low demand for workers. While manufacturing does account for 7% of the jobs in the SJVAC RPU, these are largely in the agricultural food processing subsectors. The LQ suggests concentration of jobs of in the region below the national average and the industry has experienced negligible job growth over the past five years. This tracks with a national contraction trend for employment in manufacturing where the industry accounts for 8% of all employment but has seen nearly 0% growth from 2016 to 2021.
- *Accommodation and food services and retail* are often interconnected service industries that account for a large portion of employment in the region (respectively

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<sup>5</sup> Emsi Burning Glass creates a separate hierarchy for public-sector establishments under code 90 (Government), as explained at <https://kb.emsidata.com/methodology/how-do-ems-naics-differ-from-standard-naics/>

7% and 10%). While jobs in accommodation and food services have grown at an annual rate of 1.3%, the retail industry has experienced nearly no job growth at a rate of 0.1% annually. The minimal growth in retail jobs is likely being driven by multiple factors including growth in online retail and regional economic trends. However, the size of total employment in these industries suggests there is ongoing demand for workers.

| Industry   | 2021 % of Total Employment | 2021 Location Quotient | 2016 - 2021 % Change | 2021 - 2026 % Change |
|--|----------------------------|------------------------|----------------------|----------------------|
| Government (Public-Sector Establishments)                                | 19%                        | 1.21                   | 1%                   | 3%                   |
| Health Care and Social Assistance  | 14%                        | 1.03                   | 15%                  | 15%                  |
| Agriculture, Forestry, Fishing and Hunting                               | 13%                        | 12.95                  | (6%)                 | (1%)                 |
| Retail Trade   | 10%                        | 0.97                   | 0%                   | 2%                   |
| Accommodation and Food Services  | 7%                         | 0.93                   | 6%                   | 17%                  |
| Manufacturing  | 7%                         | 0.86                   | 2%                   | 2%                   |
| Transportation and Warehousing   | 6%                         | 1.52                   | 67%                  | 18%                  |
| Construction   | 5%                         | 0.95                   | 21%                  | 7%                   |
| Administrative and Support and Waste Management and Remediation Services | 4%                         | 0.70                   | 4%                   | 9%                   |
| Other Services (except Public Administration)                            | 3%                         | 0.76                   | 0%                   | 7%                   |
| Wholesale Trade  | 3%                         | 0.76                   | (6%)                 | 2%                   |
| Professional, Scientific, and Technical Services                         | 2%                         | 0.35                   | 3%                   | 3%                   |
| Finance and Insurance  | 2%                         | 0.41                   | (3%)                 | (2%)                 |
| Educational Services   | 1%                         | 0.46                   | 12%                  | 7%                   |
| Real Estate and Rental and Leasing                                       | 1%                         | 0.70                   | 6%                   | 5%                   |
| Management of Companies and Enterprises                                  | 1%                         | 0.47                   | 4%                   | (4%)                 |
| Arts, Entertainment, and Recreation                                      | 1%                         | 0.50                   | (20%)                | 2%                   |
| Information  | 0%                         | 0.26                   | (27%)                | (2%)                 |
| Utilities  | 0%                         | 1.33                   | 16%                  | 13%                  |
| Mining, Quarrying, and Oil and Gas Extraction                            | 0%                         | 1.39                   | (20%)                | (12%)                |
| Unclassified Industry  | 0%                         | 0.00                   | (100%)               | Insf. Data           |
|  | 100%                       |                        | 5%                   | 6%                   |

Source: Lightcast Industry Table (Q3 2022 Data Set, Data Note: Rounded to nearest percent)

Table 5 depicts the SJVAC RPU occupations with the highest percentage of total employment in 2021. Transportation and material moving occupations; office and

administrative support occupations; farming, fishing, and forestry occupations had the highest percentage of employment.

**Table 5. SJVAC RPU Occupations with Existing Employment Demands**

| Occupation Group                               | 2021 % of Total Employment | 2021 Jobs | 2016 - 2021 Change | 2016 - 2021 % Change | 2021 - 2026 Change | 2021 - 2026 % Change | 2021 Location Quotient | Median Annual Earnings |
|--|----------------------------|-----------|--------------------|----------------------|--------------------|----------------------|------------------------|------------------------|
| Transportation and Material Moving             | 11.30%                     | 180,099   | 34,066             | 23%                  | 19,124             | 11%                  | 1.30                   | \$37,590               |
| Office and Administrative Support              | 10.23%                     | 162,977   | (12,922)           | (7%)                 | 1,936              | 1%                   | 0.80                   | \$41,438               |
| Farming, Fishing, and Forestry                 | 10.00%                     | 159,404   | (15,282)           | (9%)                 | (1,160)            | (1%)                 | 13.84                  | \$29,307               |
| Sales and related                              | 7.94%                      | 126,574   | (1,941)            | (2%)                 | 3,899              | 3%                   | 0.88                   | \$30,795               |
| Food Preparation and Serving Related           | 7.15%                      | 113,942   | (4,051)            | (3%)                 | 16,707             | 15%                  | 0.92                   | \$29,780               |
| Educational Instruction and Library            | 6.90%                      | 109,978   | (4,322)            | (4%)                 | 5,759              | 5%                   | 1.16                   | \$62,042               |
| Healthcare Support                             | 6.07%                      | 96,714    | 29,600             | 44%                  | 18,803             | 19%                  | 1.30                   | \$29,804               |
| Management                                     | 5.55%                      | 88,519    | 16,779             | 23%                  | 4,630              | 5%                   | 0.87                   | \$88,180               |
| Healthcare Practitioners and Technical         | 5.21%                      | 82,986    | 8,137              | 11%                  | 7,248              | 9%                   | 0.87                   | \$95,953               |
| Production                                     | 4.96%                      | 79,046    | (1,140)            | (1%)                 | 2,024              | 3%                   | 0.87                   | \$36,680               |
| Construction and Extraction                    | 3.82%                      | 60,955    | 5,634              | 10%                  | 3,868              | 6%                   | 0.96                   | \$54,605               |
| Business and Financial Operations              | 3.78%                      | 60,198    | 13,006             | 28%                  | 2,944              | 5%                   | 0.59                   | \$67,424               |
| Installation, Maintenance, and Repair          | 3.72%                      | 59,273    | 1,234              | 2%                   | 3,620              | 6%                   | 0.94                   | \$52,298               |
| Building and Grounds Cleaning and Maintenance  | 2.64%                      | 42,003    | 34                 | 0%                   | 3,613              | 9%                   | 0.85                   | \$32,724               |
| Protective Service                             | 2.51%                      | 39,970    | 1,627              | 4%                   | 1,884              | 5%                   | 1.08                   | \$60,554               |
| Community and Social Service                   | 2.01%                      | 31,992    | 1,634              | 5%                   | 2,789              | 9%                   | 1.11                   | \$50,106               |
| Personal Care and Service                      | 1.49%                      | 23,753    | (5,739)            | (19%)                | 2,284              | 10%                  | 0.70                   | \$30,645               |
| Architecture and Engineering                   | 1.06%                      | 16,845    | 848                | 5%                   | 621                | 4%                   | 0.63                   | \$89,729               |
| Computer and Mathematical                      | 1.03%                      | 16,439    | 1,907              | 13%                  | 1,163              | 7%                   | 0.32                   | \$80,209               |
| Life, Physical, and Social Science             | 0.94%                      | 14,944    | 1,542              | 12%                  | 529                | 4%                   | 1.02                   | \$71,245               |
| Arts, Design, Entertainment, Sports, and Media | 0.73%                      | 11,663    | 241                | 2%                   | 351                | 3%                   | 0.54                   | \$48,168               |
| Military-only                                  | 0.54%                      | 8,626     | (164)              | (2%)                 | 302                | 3%                   | 0.83                   | \$31,469               |
| Legal  | 0.42%                      | 6,750     | 728                | 12%                  | 287                | 4%                   | 0.53                   | \$79,821               |

Source: Lightcast Occupation Table (Q3 2022 Data Set)

## **Emerging Demand**

To assess emerging demand across regional industries and occupational sectors, the following indicators based on a five-year forecast were used.

- 2021 Jobs are the number of jobs in the industry in 2021.
- Hires are individuals that are new to a company's payroll.
- Separations are individuals that no longer appear on a company's payroll.
- The 2021-2026 % Change is the forecasted % change in number of jobs from 2021 to 2026. It is forecasted total growth from one time period to the next.

**Emerging Demand Industries:** Over the next five years, *healthcare and social assistance* is expected to continue to be an industry centered around job demand. The projected job growth is estimated at 15%. *Transportation and warehousing; accommodation and food services; and utilities* also have projected job growth.

*Professional, Scientific, and Technical Services* is expected to continue to grow modestly by 3% over the next five years.

*Mining, Quarrying, and Oil and Gas Extraction* is expected to contract by 12%.

| Industry   | 2021 Jobs | 2021 Hires | 2021 Separations | 2026 Jobs | 2021 - 2026 Change | 2021 - 2026 % Change |
|--|-----------|------------|------------------|-----------|--------------------|----------------------|
| Transportation and Warehousing   | 99,178    | 103,451    | 92,197           | 116,726   | 17,548             | 18%                  |
| Accommodation and Food Services  | 119,380   | 148,050    | 128,377          | 139,100   | 19,720             | 17%                  |
| Health Care and Social Assistance  | 217,116   | 111,562    | 103,083          | 249,406   | 32,290             | 15%                  |
| Utilities  | 7,585     | 2,572      | 3,241            | 8,537     | 952                | 13%                  |
| Administrative and Support and Waste Management and Remediation Services | 67,002    | 124,266    | 118,189          | 73,257    | 6,256              | 9%                   |
| Educational Services   | 19,303    | 11,738     | 9,825            | 20,692    | 1,388              | 7%                   |
| Other Services (except Public Administration)                            | 53,135    | 37,134     | 31,121           | 56,823    | 3,688              | 7%                   |
| Construction   | 75,281    | 66,619     | 60,060           | 80,384    | 5,103              | 7%                   |
| Real Estate and Rental and Leasing                                       | 16,769    | 8,862      | 7,977            | 17,611    | 842                | 5%                   |
| Government   | 302,188   | 74,205     | 70,351           | 312,572   | 10,384             | 3%                   |
| Professional, Scientific, and Technical Services                         | 36,988    | 27,191     | 25,336           | 38,160    | 1,172              | 3%                   |
| Wholesale Trade  | 45,670    | 21,377     | 20,188           | 46,776    | 1,106              | 2%                   |
| Retail Trade   | 156,457   | 120,703    | 111,660          | 159,794   | 3,336              | 2%                   |
| Manufacturing  | 111,517   | 55,622     | 53,660           | 113,809   | 2,291              | 2%                   |

|   |         |         |         |         |            |            |
|---|---------|---------|---------|---------|------------|------------|
| Arts, Entertainment, and Recreation           | 10,550  | 18,546  | 13,274  | 10,739  | 189        | 2%         |
| Agriculture, Forestry, Fishing and Hunting    | 200,056 | 694,692 | 694,433 | 198,454 | (1,602)    | (1%)       |
| Information                                   | 7,669   | 5,150   | 4,058   | 7,543   | (126)      | (2%)       |
| Finance and Insurance                         | 28,456  | 9,121   | 8,288   | 27,872  | (584)      | (2%)       |
| Management of Companies and Enterprises       | 11,421  | 4,831   | 4,804   | 10,955  | (465)      | (4%)       |
| Mining, Quarrying, and Oil and Gas Extraction | 7,484   | 2,496   | 2,527   | 6,619   | (865)      | (12%)      |
| Unclassified Industry                         | 10      | <10     | <10     | <10     | Insf. Data | Insf. Data |

Source: Lightcast Industry Table (Q3 2022 Data Set)

**Emerging Demand Occupations:** Job demand is expected in various occupations across the SJVAC RPU. *Healthcare Support Occupations* and *Healthcare Practitioners and Technical Occupations* are expected to grow over the next 5 years. It is also forecasted that there will be significant increase in demand for workers in occupations in the following sectors:

- Food Preparation and Serving Related Occupations
- Transportation and Material Moving Occupations
- Personal Care and Service Occupations
- Building and Grounds Cleaning and Maintenance Occupations
- Community and Social Service Occupations
- Computer and Mathematical Occupations

Each of these areas are expected to have positive job growth as an annual percentage and large total employment growth over 5 years. In addition, occupations in these industries offer both entry-level and mid-career employment opportunities.

| SOC     | Occupation Groups   | 2021 Jobs | 2021 Separations | 2021 Hires | 2026 Jobs | 2021 - 2026 Change | 2021 - 2026 % Change |
|---------|---|-----------|------------------|------------|-----------|--------------------|----------------------|
| 31-0000 | Healthcare Support Occupations                            | 96,647    | 56,862           | 62,436     | 115,453   | 18,805             | 19%                  |
| 35-0000 | Food Preparation and Serving Related Occupations          | 113,830   | 121,695          | 139,823    | 130,318   | 16,488             | 14%                  |
| 53-0000 | Transportation and Material Moving Occupations            | 180,113   | 185,892          | 204,275    | 199,236   | 19,122             | 11%                  |
| 39-0000 | Personal Care and Service Occupations                     | 23,835    | 18,969           | 25,014     | 26,083    | 2,248              | 9%                   |
| 29-0000 | Healthcare Practitioners and Technical Occupations        | 82,959    | 20,811           | 23,255     | 90,188    | 7,229              | 9%                   |
| 37-0000 | Building and Grounds Cleaning and Maintenance Occupations | 41,989    | 36,439           | 39,517     | 45,644    | 3,655              | 9%                   |
| 21-0000 | Community and Social Service Occupations                  | 31,977    | 11,876           | 13,080     | 34,758    | 2,781              | 9%                   |
| 15-0000 | Computer and Mathematical Occupations                     | 16,419    | 6,948            | 8,022      | 17,570    | 1,151              | 7%                   |



|         |  |         |         |         |         |         |      |
|---------|--|---------|---------|---------|---------|---------|------|
| 47-0000 | Construction and Extraction Occupations                    | 61,001  | 46,202  | 51,054  | 64,835  | 3,834   | 6%   |
| 49-0000 | Installation, Maintenance, and Repair Occupations          | 59,230  | 32,835  | 37,113  | 62,829  | 3,599   | 6%   |
| 25-0000 | Educational Instruction and Library Occupations            | 109,947 | 28,916  | 31,963  | 115,668 | 5,721   | 5%   |
| 11-0000 | Management Occupations                                     | 88,453  | 51,027  | 56,108  | 93,033  | 4,580   | 5%   |
| 13-0000 | Business and Financial Operations Occupations              | 60,126  | 30,674  | 34,220  | 63,045  | 2,918   | 5%   |
| 33-0000 | Protective Service Occupations                             | 39,988  | 19,217  | 21,273  | 41,844  | 1,856   | 5%   |
| 23-0000 | Legal Occupations  | 6,720   | 1,620   | 1,983   | 7,001   | 281     | 4%   |
| 17-0000 | Architecture and Engineering Occupations                   | 16,818  | 5,754   | 6,148   | 17,436  | 617     | 4%   |
| 19-0000 | Life, Physical, and Social Science Occupations             | 14,907  | 7,580   | 7,934   | 15,432  | 525     | 4%   |
| 55-0000 | Military-only occupations                                  | 8,626   | 2,087   | 2,274   | 8,928   | 302     | 3%   |
| 41-0000 | Sales and Related Occupations                              | 126,522 | 98,204  | 106,294 | 130,422 | 3,899   | 3%   |
| 27-0000 | Arts, Design, Entertainment, Sports, and Media Occupations | 11,667  | 6,783   | 7,992   | 12,001  | 335     | 3%   |
| 51-0000 | Production Occupations                                     | 79,048  | 61,411  | 63,053  | 81,007  | 1,959   | 2%   |
| 43-0000 | Office and Administrative Support Occupations              | 162,931 | 110,113 | 111,092 | 164,788 | 1,857   | 1%   |
| 45-0000 | Farming, Fishing, and Forestry Occupations                 | 159,460 | 600,858 | 594,302 | 158,312 | (1,148) | (1%) |

Source: Lightcast Occupation Table (Q3 2022 Data Set)

## II. REGIONAL INDICATORS

The California Workforce Development Board has established “regional indicators” to assess coordination and measure progress within California’s 15 RPUs. The indicators serve to track processes and activities utilized by regions, providing a foundation for regional approaches that align with the needs of businesses in key sectors.

Regions must choose at least two of the following indicators:

Indicator A: The region has a process to communicate industry workforce needs to supply-side partners.

Indicator B: The region has policies supporting equity and strives to improve job quality.

Indicator C: The region has shared target populations of emphasis.

Indicator D: The region deploys shared/pooled resources to provide services, training, and education to meet the target population's needs.

### Regional Indicators and Associated Metrics

The SJVAC RPU has selected indicators B and D. Following are the outcomes and metrics established for the two indicators:

***Metrics for Indicator B: The region has policies supporting equity and strives to improve job quality.***

Outcome 1: The region has developed benchmarks and measurements to track progress toward ensuring equity and job quality and serving employers who provide quality jobs that provide economic security through family sustaining wages and comprehensive benefits.

The region developed an “Equity Statement” and “Equity/Diversity Guiding Principles” that will support regional work and can be adopted by local boards to fulfill equity goals within their areas. English language learners have been selected as a primary target population for pilot efforts and performance metrics, a baseline, and benchmarks have been established for services to this population. WIOA performance measures provide the foundation for metrics associated with this outcome.

Outcome 2: The region has developed benchmarks and measures to track individuals that complete training and/or attain industry-recognized credentials aligned with the sectors and occupations emphasized in the Regional Plan.

The SJVAC region has developed training completion benchmarks and measures for the target population. The CalJOBS system will be used to track data.

***Metrics for Indicator D: Region deploys shared/pooled resources to provide services, training, and education to meet target populations’ needs.***

Outcome 1: The region has a system in place to track co-enrollment strategies to serve participants holistically and track individuals that complete training and/or attain industry recognized credentials aligned with the sectors and occupations emphasized in the Regional Plan.

The local boards within the SJVAC RPU utilize the CalJOBS system to manage co-enrollments, while recognizing that the system has limited capabilities for co-enrollment reporting. Some local boards in the region offer cohort training for their customers. In such cases, services are coordinated, and customer progress information is shared. For example, as part of the English language learners served under SJVAC RPU's Regional Planning Implementation Grant 4.0, individuals enrolled in training will be tracked to determine how many obtained an industry-recognized credential and, of these individuals, how many receive one aligned to the region's target sectors and local demand occupations.

Outcome 2: The region has developed benchmarks and methods to track workforce staff and partner professional development training on services, training, and education to meet target populations needs.

This outcome is measured through tangible actions, including the following:

- The SJVAC RPU conducts a bi-annual assessment of staff development needs to determine training that will be made available to regional partners and staff. Trainers are identified and properly procured, and a training calendar is developed. Those who participate in regional training complete evaluations at the conclusion of each session and follow-up surveys are conducted to gauge participant's retention of information and the impact of training at the workplace. Training topics are aligned with goals of both the Regional Plan and the WDBs' Local Plans.
- The region addresses all priority training areas for frontline staff that are identified in State policy guidance on required content for Local Plans. These areas include:
  - Expand proficiency in digital fluency and distance learning.
  - Ensure Cultural Competencies, and
  - Understand of the experiences of trauma-exposed populations

Outcome 3: Leveraging resources across local areas for regional initiatives.

This outcome is measured through collaboration and leveraging of financial resources, including the following:

- HR Hotline Service: The SJVAC and Middle Sierra regions have contracted with "California Employers Association" to offer "HR Advice on Demand" services for local employers. Participating WDBs include Kern/Inyo/Mono, Madera County, Merced County, Mother Lode, San Joaquin County, Stanislaus County, and Tulare County. Collectively, the WDBs contributed \$83,595 to cover the cost of the service.

- U.S. Department of Commerce Economic Development Administration “Good Jobs Challenge Grant” – The SJVAC and Middle Sierra RPU's collaborated on a Healthcare-focused grant proposal and collectively contribute \$27,750 to procure the services of a grant writer. Grant partnerships include private and public healthcare employers; regional healthcare associations; private and public educational institutions, including regional education consortia; organized labor; community-based organizations; and local WDBs.
- Regional Equity Recovery Partnership (RERP) Grant: The SJVAC region and partners leveraged \$3,941,926 in support of RERP grant services to targeted populations.
- Joint Procurement of a One-Stop Operator: The WDBs in Kings, Madera, Merced, San Joaquin, and Stanislaus counties entered into an agreement for the procurement of a One-Stop Operator for two fiscal years (2021-22 and 2022-23) totaling \$135,625, which is collectively paid by participating WDBs.

#### **Impact of Indicators and Metrics on Service Delivery**

The SJVAC RPU's regional indicators, metrics, and outcomes will have the following anticipated effects on services, strategies, and approaches at the local level.

#### ***Local Service Delivery Impact for Indicator B: The region has policies supporting equity and strives to improve job quality.***

The development of the regional Equity Statement and related Equity/Diversity Guiding Principles will enable local boards to develop local service delivery goals and strategies resulting in increased participation by and outcomes for underserved and vulnerable populations. Service strategies that will initially be targeted to English language learners will include increases in enrollments in WIOA services; referral to and co-enrollment in partner programs and services; co-case management of participants across two or more partners; completion of training academic and vocational training; credential attainment; job placement in career path employment; wages; and job retention. Over time, strategies utilized to improve services and outcomes for English language learners can be adapted and customized for other priority populations.

#### ***Local Service Delivery Impact Indicator D: Region deploys shared/pooled resources to provide services, training, and education to meet target populations needs.***

Tracking referrals and co-enrollments will enable local boards to identify strategies to for holistic service delivery that result in better employment, earnings, and retention outcomes for participants. The indicator's focus on training for local boards' staff and partners will enable frontline staff and others to provide services that address participant barriers and respond to their needs. In addition, continued leveraging of financial resources among local boards will provide WDBs greater budget flexibility to meet their organizational needs.

#### **IV. FOSTERING DEMAND-DRIVEN SKILLS ATTAINMENT**

Labor market information and intelligence gathered from representatives of businesses in priority sectors help to inform the content and quality of local and regional workforce programs.

##### **In-Demand Industry Sectors for the Region**

Under the SJVAC RPU's PY 2017-20 Regional Workforce Development Plan, the partners selected the following sectors as priorities:

- Advanced manufacturing
- Construction (including public infrastructure)
- Energy (including green energy)
- Healthcare
- Transportation and logistics
- Agriculture

The SJVAC Regional Plan continues to prioritize these sectors due to their prevalence within the region and predicted strength well into the foreseeable future. While manufacturing and energy do not show significant growth, over the four-year period covered by the plan, there is demand for workers in these industries based on worker replacement considerations (manufacturing) and subregional demand for workers (energy).

Additional sectors show emerging growth and the opportunity to create significant numbers of jobs. The following is a summary of key data pertaining to the region's priority sectors and related occupations, which is drawn principally from economic analysis conducted during the development of the original PY 21-24 Regional Plan and as part of preparing the biennial update.

The SJVAC RPU is expected to grow economically over the next five years. Unemployment has continued to decrease over 2021 and will continue to drop to near pre-COVID-19 levels over the course of 2022. The region has many of the ingredients needed for healthy economic growth: a large working age population and a high rate of workforce participation, historical and forecasted growth across a diverse mix of industry sectors, job demand across a range of occupations with varying education or training requirements, and an economy that offers opportunities for workers at various stages of their careers. While many industries are forecasted to continue to grow modestly over the next five years, a large portion of economic growth and job development in the Central Valley is situated in a handful of sectors, specifically within healthcare; accommodation and food services; and transportation and warehousing.

The *healthcare* industry is the largest generator of jobs for the Central Valley and is expected to continue to grow at a rate of 3% per year. Occupations in healthcare support, healthcare practitioners, and social service providers are all projected to grow over the

next five years. A new impetus for growth in the sector will be the UC Merced Medical School project. Starting in 2023, a Health, Behavioral Sciences, and Medical Education Building at UC Merced will support a B.S. to M.D. joint degree program operated in collaboration with UC San Francisco-Fresno, along with public health and psychological sciences faculty and students. Given the growth and demand in this industry/occupational sector, investment in the region's healthcare career technical education pipeline will remain a priority for the region's workforce development partners.

The *transportation and warehousing* industry and related occupations represent a unique opportunity for the region. This industry and associated occupations have demonstrated high growth (8.3% annually) over the past five years. There is additional projected growth (3.6% annually) over the next five years and higher than average local demand. This trend is likely driven by several factors including growth of online shopping and ecommerce with notable growth during the pandemic as well as the region's strategic location along California's main transportation corridor and availability and affordability of land for developing large distribution centers. Many of the occupations in this sector are entry-level, but they offer respectable wages and are opportunities for job seekers entering or reentering the workforce or for job seekers that experience barriers to employment.

The *construction* industry is also expected to continue to experience healthy job growth at a rate of 1.4% annually. Similarly, construction and extraction occupations are also expected to add 3,868 jobs to the region and grow at a rate of 12% annually. This trend will likely be driven by construction projects in both the Central Valley as well as adjacent large urban areas, such as the San Francisco Bay Area and Los Angeles regions.

The *retail trade and accommodation and food services* industries experienced outsized employment contractions due to COVID-19. With social distancing measures fully lifted, these industries have rebounded to pre-COVID-19 employment levels and are projected to have positive growth in the next five years. As a large share of the retail economy has shifted to online sales, it is not clear the extent to which this sector will return fully to a brick and mortar economy. Retail has historically been a large generator of entry- and mid-level jobs. A permanent contraction in this industry could impact employment trends, especially for entry-level jobs.

Lastly, *agriculture* will continue to be a behemoth in terms of the total percent (13%) of employment for the region. However, job growth in agriculture is expected to be flat or slightly contract. This is likely due to both advances in agricultural technology and the use of automation that reduce labor demand as well as geographic limitations on farmable terrain. It is also worth noting that agriculture jobs are often labor intensive and offer some of the lowest wages in the region. However, for the foreseeable future, agriculture will continue to account for a wide portion of employment across the region.

There are several industries in the Central Valley with new and emerging opportunities for which the workforce partners may want to consider developing career education pipelines. These include arts, entertainment, recreation and wholesale trade industries.

From an occupational standpoint, there is a growing occupational demand in protective services as well as a notable demand for installation, maintenance, and repair occupations. It is also worth noting that these are careers that offer sustainable wages and have less demanding training requirements for entry-level positions than other jobs with comparable pay.

Although the next few years are expected to bring recovery and growth across the state and the Central Valley, there is still uncertainty, and changes could impact the region's industries and workforce. COVID-19 aside, the future of work is expected to experience dramatic changes over the next decade with growing trends towards remote work, shifting consumer demands, technological innovations, and automation of key occupations. The SJVAC RPU and the affiliated local workforce boards must continue to monitor micro and macro industry and occupational trends and look for opportunities to strengthen existing workforce investments, bolster career education pipelines, and develop a modern and in-demand workforce.

### **Sector and Related Industry-Focused Initiatives**

There are fully developed sector-focused career pathway programs in the Central Valley, many of which were developed based on specific requests from and input by industry. Other initiatives are emerging. While many of these sector initiatives already cross local boundaries, others are suitable for scaling up throughout the region. Examples of current and anticipated sector and industry-focused initiatives include:

#### ***Healthforce Partners - Healthcare***

The healthcare sector in the Northern San Joaquin Valley needs qualified workers. Community residents want to pursue healthcare careers. To achieve these compatible goals, healthcare employers, educators, workforce development professionals, and community leaders worked together to launch an innovative partnership: HealthForce Partners Northern San Joaquin Valley. The mission is to serve as a catalyst to improve career pathway opportunities for community residents and to increase the supply of skilled healthcare workers. HealthForce Partners brings together leaders from healthcare, education, and workforce development to develop strategies that meet the needs of the region's employers and expand educational and work opportunities for community residents. The partnership convenes key stakeholders to identify workforce gaps and develop solutions to address them. Programs include, but are not limited to: Registered Nursing, Certified Nursing Assistant, Medical Assistant and Behavioral Health.

#### ***Tulare - Kings Health Care Partnership – Healthcare***

This industry-driven partnership addresses the workforce, education, training, and competitiveness needs of the healthcare industry in Tulare and Kings counties. Established in 2009, it has 6 participating organizations representing over 9,000 employees. The partnership hosts an annual exploratory career conference for high school students, plans and facilitates an annual teacher externship event, and works to

address industry pipeline needs through ongoing partnerships with education and workforce development. Tulare County WIB provides staffing support for this partnership, as this approach continues to function as an effective means of engagement of with industry.

### ***South Valley Industrial Collaborative - Manufacturing***

The South Valley Industrial Collaborative (SVIC) is a partnership for community excellence that provides a platform to build industry-led, industry-driven, and community-supported partnerships to strengthen economies in the South San Joaquin Valley. This partnership grew out of an Industrial Advisory Board for which the Tulare County WIB provided staffing support. It is now an industry controlled 501(c)(6). The South Valley Industrial Collaborative provides a sub-regional platform, particularly focused on Tulare and Kings counties, for industry and businesses to collaborate and connect with regional, state and national partner organizations to support the region's efforts to become a globally competitive location for manufacturing and industrial jobs. Key priorities for the SVIC Focus Teams are talent acquisition, development and retention; policies and regulations impacting business; and infrastructure.

### ***Tulare - Kings College and Career Collaborative – Multiple Industries***

Workforce boards from Tulare and Kings counties co-facilitate a workgroup to strengthen and scale industry partnerships. This year, the workgroup has prioritized the launch of three regional industry advisory boards to connect education and industry. Workgroup members include representatives from chambers of commerce, the K-12 education system, post-secondary education, and workforce development. Volunteers have agreed to staff and support the advisory groups, develop an industry-focused structure, participate in facilitation of training, and launch three regional advisory boards - Business and Finance; ICT; and Arts, Media, and Entertainment. The workgroup is also considering advisory boards for Manufacturing and Product Design and Building Trades and Construction.

### ***Fresno-Madera K-16 Collaborative***

Fresno State Foundation, on behalf of the Central San Joaquin Valley K-16 Partnership was awarded \$18.13M by the California Department of General Services, Office of Public School Construction's Regional K-16 Education Collaborative Grant Program to equitably strengthen education-to-workforce pathways and ensure that educational, vocational, and workforce programs work in partnership to address the income, racial, and gender inequalities in education and employment.

### ***Central San Joaquin Valley K-16 Partnership***

This collaboration of the Fresno-Madera K-16 Collaborative and the Tulare- Kings College and Career Collaborative was created to strengthen the region's education and socio-economic equity, leadership, support, and impact on 516,574 K-16 students and adult



learners. The aim of the partnership is to eliminate intersegmental silos and unite partners to build relationship infrastructure for future work. By braiding approaches and resources, the partners are confident there will be a significant increase in filling an LMI-supported job talent pipeline to ensure that individuals thrive personally and professionally.

### ***Biomethane Production – Green Energy***

The Central Valley has seen substantial renewable energy production and infrastructure construction over the last five years. One area that is evolving and on the cusp of moving from small independent operations to more commercial production is biomethane producing anaerobic digesters, which use organic matter (dairy manure was the first) to produce two key products: renewable biomethane that is fed back into the grid through current infrastructure and remaining organic matter that is used as a natural fertilizer for agriculture. Growth is being spurred by new regulations. Specifically, these are the Mandatory Commercial Organics Recycling provisions that were put in place in 2016 under AB 1826 which phased up in September 2020. These provisions require all businesses with more than 2 cubic yards of solid waste to recycle a minimum of 50% of their organic waste, rather than dispose of it in the land fill. This has created a secondary market for the purchase of organic wastes which supports transport, builds supporting equipment, and provision of supporting infrastructure from SCE and PG&E. The first large scale projects in the upper and lower parts of the Central Valley (complexes at least 100 acres each) are completing feasibility studies. This sector of the economy is currently impacting all Central Valley counties. This is exemplified by a new facility in Madera County and by investments in and scaling of projects in Stanislaus and Merced counties. The workforce system is ready to begin to provide training and placement services to support this emerging energy subsector.

### ***Carbon Capture and Sequestration Project***

Kern County is working on a carbon management business park that could clean the air in the Central Valley by participating in the U.S. Department of Energy's "Local Energy Action Program called "LEAP." Participating in the LEAP Program would be the first such initiative to explicitly align with the economic development and social equity priorities of the County's B3K Prosperity economic development collaboration. The LEAP Technical Assistance Grant seeks to help communities access the economic and environmental benefits of clean energy and clean energy manufacturing. Opportunities and potential benefits include lower local air pollution, lower utility costs and energy burdens, improved access to reliable energy, enhanced economic productivity, and new clean energy supply chain and manufacturing. The project is likely to bring with it the potential for a wide range of new jobs, which South Valley communities are currently assessing and beginning to prepare for such opportunities.

### ***Valley Build – Construction***

The SB-1-funded Valley Build High Road Construction Careers (HRCC) project is led by the Fresno Regional WDB and serves an expansive region that includes the following

fourteen (14) counties: Alpine, Calaveras, Fresno, Kings, Inyo, Kern, Madera, Mariposa, Mono, Merced, San Joaquin, Stanislaus, Tulare, and Tuolumne. The project provides inclusive access to MC-3 pre-apprenticeship training and related services that enable individuals from all backgrounds to qualify for employment and acceptance into apprenticeships in the skilled building and construction trades. The goal of the project is to build a network of community partners throughout the region to promote Valley Build and to recruit target candidates for pre-apprenticeship training.

### ***Central Valley Forestry Corps***

The Central Valley Forestry Corps is a partnership between the Fresno Regional Workforce Development Board, the Mother Lode WDB, Fresno Economic Opportunities Commission's Local Conservation Corps, Reedley College, and Columbia College. The Central Valley Forestry Corps will train the next generation of forestry workers to address the natural disasters occurring within our forests. Beginning with funding from CalFire, the initiative is preparing an untapped workforce within the Central Valley to assist in the removal of 129 million dead trees. Training is crucial to decrease the number of wildfires in California. According to CalFire, as of late 2022, there have been 7,490 fires that have burned over 362,455 acres.

### ***Inland Ports Initiative***

Fresno, Merced, and San Joaquin counties are partnering on a grant application to the California State Transportation Agency (CalSTA) Port and Freight Infrastructure Program that seeks to improve the capacity, safety, efficiency, and resilience of goods movement to, from, and through California's ports. With a key focus on the transportation and warehousing sector, tied to this initiative will be training for workers across a wide range of occupations.

### ***Fresno-Merced Future of Food (F3)***

Serving Fresno, Kings, Tulare, Madera and Merced counties, the Fresno-Merced Future of Food Innovation (F3) coalition, led by the Central Valley Community Foundation, will receive approximately \$65.1 million from Economic Development Administration (EDA) to accelerate the integration of technology and skills in the region's agriculture industry—improving productivity and job quality for existing farmworkers while driving a more resilient and sustainable food system. The coalition unites partners such as University of California, Merced, the California Farmworkers Foundation, industry leadership like the California Fresh Fruit Association, regional philanthropy, and local government around a vision for a more innovative, equitable, and resilient agricultural industry in one of the country's most important food-producing regions. Today, California's Central Valley produces 25 percent of the nation's food supply yet has one of the highest food insecurity rates among low wage farm workers. EDA funding will launch iCREATE, a new ag-tech hub, with the mission to accelerate the development and transfer of technology between researchers at local universities and farmers across the region, with a focus on reaching BIPOC or underserved small farmers. At the same time, community colleges throughout

the Central Valley will receive access to new technology and training to equip workers with the skills needed to access higher quality, higher paying jobs in ag tech, improving both farm productivity and wages.

### ***UC Merced Water Systems Management Lab Project***

The project is examining the impacts of the drought on California agriculture. Recent California climate extremes, which include among the most severe droughts on record, have highlighted rapidly changing conditions that affect water supply for agriculture and the state's growing population. Incremental water management and institutional learning at all levels has provided building blocks to better manage water shortages. At the same time, communities connected to agricultural areas share, to varying extents, multi-year drought impacts such as water shortages, high temperatures, and their lingering effects through dry wells, fire risk, and degraded air and water quality. A project team made up of UC and CSU academics, in partnership with the Public Policy Institute of California Water Policy Center, will develop various milestone products including economic impact assessments, policy briefs, and an open access web tool that builds from currently available tools, and past collaborations. From this information, the workforce system in the Central Valley will assess and respond to workforce needs arising from water management strategies.

### ***Community Economic Resilience Fund (CERF)***

CERF is a state initiative supporting innovative plans and strategies to diversify local economies and develop sustainable industries that create good-paying, broadly accessible jobs for all Californians. As part of CERF's initial planning phase, 13 economic development entities known as High Road Transition Collaboratives received \$5 million each to develop roadmaps, including a strategy and recommended series of investments, for their region. Following this planning phase, the program's implementation phase will begin in 2023 and make available \$500 million to fund projects identified by the High Road Transition Collaboratives. All SJVAC Region WDB's are represented in their local/sub-regional CERF initiatives, which include ones in the Northern San Joaquin Valley, Central San Joaquin Valley, and Kern County.

### ***Regional Equity and Recovery Partnerships (RERP)***

Through the High Road approach of advancing economic opportunities and strengthening the workforce based on industry demand, the SJVAC region's "Skills to Success" projects will provide access to various training programs and work-based learning and increase opportunities and equity for targeted populations. The targeted populations will gain access to the necessary skills to fill the skill gaps and become self-sufficient.

Fresno Regional WDB – Construction and Manufacturing: With the anticipated influx of public infrastructure spending, FRWDB in coordination with Fresno City College and the State Center Adult Education Consortium seeks to address the human capital needs of

the Fresno metropolitan area and the surrounding rural communities by providing short-term training that will equip residents to secure quality, good wage jobs in the two sectors.

Kern, Inyo, Mono WDB – Healthcare: The Kern/Inyo/Mono RERP project, in partnership with education, is designed to address industry needs and educational capacity to increase the pipeline of healthcare workers. The RERP initiative will address unmet needs and expand access to healthcare careers and quality jobs, especially among minority residents.

Kings County WDB – Manufacturing: In partnership with West Hills Community College in Lemoore, the Kings County Job Training Office will provide paid work experience training to students attending the Industrial Maintenance Training tuition-free courses. Those earning a certificate will qualify for entry-level employment in the manufacturing career path.

Madera County WDB – Manufacturing: The project in Madera County will focus on manufacturing training for middle-skill jobs in the industrial maintenance, manufacturing and welding career pathways. Participants will earn a certificate of achievement in one of the pathways that prepares them for entrance into the manufacturing workforce or the ability to transfer to a four-year college program.

Merced County WDB – Manufacturing: Merced County will focus on the development of GED/High-School Diploma-to-Skilled Manufacturing pipeline. The project will cover Merced County as a whole, but will utilize culturally competent outreach strategies to focus on residents living outside of the County's two largest cities (Merced and Los Banos) in the County's more rural communities.

San Joaquin County WDB – Manufacturing and Transportation and Logistics: The San Joaquin County WDB will address the workforce gaps in warehousing, goods movement, distribution and manufacturing. In partnership with the Delta Sierra Adult Education Alliance (DSAEA), the WDB will provide on ramps to career paths in the transportation-distribution-logistics and advanced manufacturing sectors for community residents, including pathways to middle skill jobs requiring some college.

Stanislaus County WDB – Manufacturing: Stanislaus County will assist workers to enter the manufacturing occupations, discover their personal interests and strengths, and prepare for an apprenticeship that will lead to high wage occupations and journey-level skill attainment. Stanislaus County will offer options for job seekers to enter the manufacturing occupational career ladder, and provide incumbent workers with tools necessary to further their value to employers.

Tulare County WIB – Construction, Manufacturing, Transportation and Logistics: The Tulare Workforce Investment Board (WIB) intends to use this investment to accelerate the work the WIB and its community colleges are doing together to ensure that the local economy expands and that its historically marginalized populations have an opportunity to participate in the resulting prosperity by securing quality jobs in demand sectors.

### **Strategies to Communicate with Regional Employers**

The majority of business contacts are made at the local level between the eight WDBs and employers within their counties. However, when two or more local boards work with the same business across their jurisdictions, they make every effort to collaborate and coordinate messaging and service delivery. Such efforts are most common in rapid response and layoff aversion activities and with businesses that are establishing new operations in more or more areas in the Central Valley.

To promote coordinated and cohesive messaging, the local boards have collaborated on the development of a regional website focused on services for businesses. The Valley Work site ([www.valleywork.org](http://www.valleywork.org)) has been developed to communicate how workforce programs can assist businesses, provide examples of strategies that have been deployed to support Valley-based companies, and communicate contact information to employers. Since the PY 21-24 Regional Plan has been implemented, 565 companies have accessed Valley Work online, spending an average of just one minute on the website. To improve the utility of the site for businesses, local boards are examining ways in which it can be improved. Under consideration and review are including information about the Region's HR Hotline service; promoting recruitment events, such as job fairs throughout the region; providing information beyond direct local board services, such as "employer tax credit" information; highlighting sector strategy initiatives; and various other enhancements.

The local boards will work through the CCWC and its workgroups to design, develop, and implement improvements to the Valley Work site and will complete improvements to the site prior to the end date of the PY 21-24 Regional Plan.

## **V. ENABLING UPWARD MOBILITY FOR ALL CALIFORNIANS**

Workforce system leaders throughout the Central Valley fully support the State Plan's focus on ensuring that workforce and education programs are accessible for all Californians, especially populations that experience barriers to employment. The region is committed to promoting access for everyone to training and services needed to prepare for careers that offer opportunities for long-term economic self-sufficiency and economic security.

### **Working with Businesses that Provide Quality Jobs**

The eight local boards all focus on matching qualified job seekers with businesses that pay competitive wages and offer benefits. Still, the nature of our work requires local workforce systems to assist job seekers from a wide range of backgrounds with varying levels of skills and experience. Local boards' strategies concentrate on the use of career pathway programs to train and prepare job seekers to become competitive candidates who qualify for good jobs that are commensurate with their skills and experience. Job placement on the path to a high road job is the first step for many participants.

#### ***High Road Jobs Strategy***

The local boards have prioritized sectors that represent high demand, high wage jobs. Such jobs exist in healthcare, logistics, construction, manufacturing, and other industries targeted by the region. Companies in these sectors that pay the highest wages and offer the best overall packages to employees are those that are highly competitive and/or have unique positions within the economy. They include large companies, utilities, public agencies, and businesses whose workers are represented under collective bargaining agreements, among others. There are also small and medium sized businesses that offer very attractive wages and benefits in an attempt to secure the best talent, enabling the businesses to grow and to fare better in the marketplace. As stated above, the local workforce system targets these companies and refers qualified candidates for available jobs. Because many of the job seekers we work with have limited work experience and entry-level skills, local boards also work with a wide range of other businesses, including those with jobs paying lower wages and offering fewer benefits. These jobs are not intended to be jobs without the potential for advancement. Rather, for job seekers on a career path, they provide the opportunity to gain experience, build their resumes, and put skills (including those that are newly acquired as the result of training) to work in a competitive work environment. The jobs are a step on a career path to high skilled, high wage, high road jobs.

#### ***Focus on Career Pathways***

The SJVAC RPU boards have implemented regional career pathway strategies that begin with the provision of information. Such information is available through a regional initiative that culminated in the development of a website, [www.careersinthevalley.com](http://www.careersinthevalley.com), which encompasses the SJVAC RPU. Job seekers engage in career exploration that informs

choices about the jobs and careers they want to train for and increases their knowledge about training, skills, and experience necessary for these jobs and careers. For example, healthcare is the sector with the highest demand for jobs in the Central Valley and it provides a range of career ladder and career lattice opportunities. Most job seekers do not come to the one-stop system with skills that will enable them to become a Registered Nurse (RN) within a year. However, there are less skilled positions that can be trained for in that timeframe. Workforce system participants become aware of the steps necessary to move from a Certified Nursing Assistant position to that of RN. The position is part of the career path they have selected. The entry-level job and its wages are a stop on the way to a career destination.

### ***Promoting Job Quality***

The local boards promote job quality by looking for the best job matches for participants at all skill levels. They also do so through investments, such as focusing on on-the-job training positions that pay wages above a prescribed level and by only approving training that prepares individuals for high demand jobs in priority sectors through career pathways programs and other models focused on high growth and other demand industries. There is no structure through which a “region” can adopt policy. Policy is the purview of workforce development boards. Workforce leadership will continue to engage board members in discussions about job quality to determine what fits best with the policy framework of their local workforce systems.

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| <b>Shared Target Populations and Targeted Service Strategies</b> |
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While the SJVAC RPU covers a massive area representing about one-fourth of California’s geography, there are many commonalities throughout the region, including populations that are most in need of workforce services. The region’s ability to identify shared populations and develop common strategies to meet the needs of these job seekers is enhanced by the WDBs’ commitments to collaboration that are described in Section V of this plan.

### ***Shared Populations***

Across the entire region, target populations include English language learners, individuals who lack a high school credential, those who are basic skills deficient, CalWORKs recipients, individuals with disabilities, formerly incarcerated individuals, communities that are digitally disenfranchised, non-custodial parents with child support enforcement orders, disconnected youth, and veterans. At a sub-regional level, there are also target groups shared by two or more boards. For example, boards in the northern part of the Valley serve many individuals who become commuters to jobs in the Capital region and the Silicon Valley. Counties which are home to the Valley’s largest cities are increasingly focused on working with homeless and housing insecure individuals and families. Five of the region’s boards completed a grant project that addressed workforce and support needs of individuals experiencing opioid addiction. Local boards agree that many served by their workforce systems have multiple barriers to employment.

### ***Targeted Service Strategies***

The region's local boards use many of the same strategies to address the needs of target populations. Often, due to distance factors, these are common strategies among the local boards, rather than systems that share providers or services. Joint grants in which multiple boards participate (e.g., Prison to Employment, Disability Employment Accelerator, Veterans Employment Assistance Programs, Regional Equity and Recovery Partnerships) offer opportunities to apply common service strategies for target populations. One example is the use of Navigators across many grants. This strategy has proven successful in working with job seekers with disabilities, English language learners and other vulnerable populations. Moving forward, regional workforce leaders expect many opportunities to identify services strategies that may be effective for target populations across many local areas. As the boards address workforce needs during economic recovery, issues will likely arise that require new approaches that could be developed regionally and implemented locally.

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| <b>Working with Businesses and Training Providers to Ensure that Historically Unserved and Underserved Communities have Equal Access</b> |
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Each of the local boards represented by the SJVAC RPU supports and promotes equal access to all services and activities of its local workforce system. As such, workforce leaders and system staff will continue to use and will improve upon messages that communicate our commitment to equity.

### ***Promoting Equal Access***

The workforce system relies on required system partners, community-based organizations, local government, economic development, education and training providers, and local businesses to achieve the goals and performance objectives of WIOA and related programs. Working together effectively requires that stakeholders share common principles that guide their work. While it is our hope that all partners are fundamentally committed to providing equal access to opportunities for services, training, and employment, it is our intention to ensure such access exists. Clear and consistent information and messaging is key to increasing the shared commitment of all stakeholders to providing equal access for all job seekers. The Central Valley is wonderfully diverse in terms of ethnicities, nationalities, religions, cultures, and languages. The power of this diversity provides a platform for local boards to communicate to providers and businesses the importance of equal access in all transactions. Each local board has and will continue to adopt its own approaches to promoting equity, leveraging ideals, values, and messages that resonate in the communities they serve.



### ***Workforce System Commitment to Equity***

As expressed in the introduction to this Plan, the region's workforce leaders are committed to equity, diversity, inclusion, and access in every aspect of their operations and programs. Several of the local boards have included within their PY 2021-24 Local Plans their intentions to communicate the workforce development board's position on equity. In many cases, this may be in the form of a formal policy. As stated above, there is no structure for the adoption of policy at a regional level. However, it is possible that the boards can share their local-level efforts, and that a protocol for workforce system equity can be developed that would provide a framework for all boards as they consider the adoption of policies related to equity.

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| <b>VI. ALIGNING, COORDINATING, AND INTEGRATING PROGRAMS AND SERVICES</b> |
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As described, the Workforce Development Boards of the Central Valley have a long history of collaborating, regionally and sub-regionally, on sector strategies, initiatives serving key groups, and on the design, development, operation, and administration of successful workforce programs. Local boards within the region consistently strive to use limited resources as effectively as possible. The following is an overview of current and potential future efforts to achieve regional coordination and alignment of services, systems, and strategies.

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| <b>Regional Service Strategies</b> |
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Regional agreements, strategies and initiatives include the following:

***Central California Workforce Collaborative Regional Agreement***

For more than a decade, the boards that comprise the SJVAC RPU have had a memorandum of understanding (MOU) in place that provides a framework for collaboration among the local boards and creates opportunities to coordinate, especially with regard to special projects and initiatives that cross local area boundaries. The purpose of the MOU is to maintain cooperative and mutually beneficial relationships. The MOU describe CCWC members as “a confederation of equals.” The CCWC operates under a general working structure, rather than as an entity. Both the current and prior MOUs stress the importance of collaboration with regard to securing regional funding and the leveraging of resources to strengthen the workforce system throughout the Central Valley. The MOU emphasizes the independence of the eight boards and the fact that all parties agree to respect one another’s organizational practices and management structures in the execution of collaborative activities. The agreement empowers the boards to: develop and implement collaborative efforts at a regional and sub-regional level; conduct formal and informal meetings under the CCWC name to discuss best practices; utilize the CCWC name in sponsorship materials for third party organizations; and, project by project, designate local workforce development boards as the “lead agency” for regional and sub-regional initiatives. Furthermore, the CCWC MOU establishes a format for meetings, which may be held in person, via electronic media, or through conference calls, and for keeping minutes of scheduled meetings. Responsibilities for organizing meetings rotate among the boards. The agreement is periodically reviewed and updated, confirming the value that the boards place on cooperation and bringing greater capacity and resources to the region.

***Central Valley Industry Engagement Roundtable***

Supporting regional and local efforts to serve business is the Central Valley Industry Engagement Roundtable (CVIER), which includes participation by all eight local boards in the Central Valley and Mother Lode WDB. Also participating in CVIER are EDD, the Small Business Development Center, and the California Labor Federation. CVIER

members have identified and responded to needs to increase staff knowledge about labor market information, Incumbent Worker Training, rapid response services, and sector partnerships. The group originally met monthly to coordinate messaging, discuss rapid response strategies, and develop business-responsive approaches for the region. Given the progress that the region has made, the group now convenes quarterly.

### ***Regional and Sub-Regional Grants***

One of the longstanding benefits of collaboration among local boards in the Central Valley has been jointly securing competitive grants. Based on the focus of the projects, collaborative grants may include participation by WDBs throughout the region or as few as two local boards. As the biennial update to the plan was being developed, local board representatives cited the following examples of regional and sub-regional grants include:

- Veterans Employment Assistance Program: Stanislaus County (lead), Madera County, Merced County and San Joaquin County WDBs. *Project is active.*
- Opioid Grant: Merced County (Lead), Kern, Inyo, Mono WDB's. *Project has been completed.*
- Prison to Employment Grant (P2E): San Joaquin County (lead), Stanislaus County, Merced County, Madera County, Fresno County, Tulare County, Kings County, and Kern/Inyo/Mono Counties WDBs. *Original project has been completed. A new grant has been awarded.*
- SB1 Grant: Fresno Regional (lead), San Joaquin County, Merced County, Mother Lode, Madera County, Kings County, Stanislaus County, Tulare County and Kern, Inyo, Mono WDBs. *Project is active.*
- Disability Employment Accelerator Grant, Veterans (DEA): Kern, Inyo, Mono (lead), Tulare County, and Kings County WDBs. *Project has been completed.*
- U.S. Department of Commerce, Economic Development Administration Good Jobs Challenge. Participating boards include Fresno Regional, Kings County, Madera County, and Tulare County. Grant has been awarded and project is being implemented.
- Regional Planning Implementation (RPI) Grants: All boards have participated in grant awards 1.0 through 4.0. *Grant projects have been completed.*

### ***Regional Scaling of Local Models***

As described in connection with regional sector strategies, bringing successful local models to scale throughout the region is an ongoing goal for the SJVAC RPU. An example of a local initiative that many local boards remain interested in replicating is the apprenticeship programs that have been developed by the San Joaquin County WDB in partnership with local high schools and county government.

|  |
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| <b>Regional Administrative Cost Arrangements</b> |
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While the region does not have formal administrative costs arrangements in place, local boards' collaborative efforts yield efficiencies. An example is a shared contract with a one-

stop operator that benefits five local boards. Madera County WDB manages as master agreement with the vendor (Beaudette Consulting, Inc.), which separately invoices each local workforce area for the services it provides. Participating WDBs include Madera County (lead), Kings County, Merced County, San Joaquin County, and Stanislaus County.

Additional collaborative initiatives currently under consideration by the local boards, include:

- A single local board to function as a regional Eligible Training Provider List Coordinator;
- A single local board to function as a multi-WDB Monitoring Coordinator;
- Joint marketing efforts benefitting multiple local boards; and
- Coordination by a local board of procurement of an AJCC Certification consultant.

As the biennial update was being developed, it was noted by local board representatives that progress is being made in several areas, including collaboration on review and monitoring of institutions and programs on the Eligible Training Provider List for which individual training accounts are utilized. Another target on which progress was noted is promotion of the regional programs and initiatives via the Valley Work website.

All of the foregoing initiatives remain under consideration, with the CCWC and its various workgroups being the principal mechanism for both examining key issues and for moving them forward.

## **VII. PRIORITY CONSIDERATIONS FOR PROGRAM YEARS 2021-24**

Based on input that regional workforce leaders and stakeholders provided during discussions held throughout the process used to develop the original PY 21-24 Plan, the following topics were identified as priorities for further examination, exploration, development, and/or enhancement over the four-year period covered by the Regional Plan. The Directors of the RPU's eight local boards will work with their WDB members, elected officials, business leaders, and local partners and stakeholders to set the agenda for review of these priorities and, following such review, determine where, when and how action should be taken. It should be noted that, during the biennial review process, some considerations were revised based on changing economic and labor market conditions. Others were removed altogether. As noted at the conclusion of this section, a supplementary stakeholder input process was organized in connection with the development of the Plan modification and several new priorities were identified.

### ***Protocols and Policy Frameworks***

1. Draft a policy framework around quality jobs that could be shared with local boards and serve as a resource for development of policies at the local level.
2. Draft a policy framework covering equity, diversity, inclusion, and access which local boards could reference as they consider policies.

### ***Recovery Strategies***

3. Determine how elected officials, local government, economic development, education, and workforce development can coordinate resources and develop joint strategies to support businesses and workers in recovery from the recessionary effects of the pandemic.
4. Assess the effects on various populations, such as women and Latinos, who, according to numerous reports, have been most significantly affected by and experienced the greatest losses as the results of the pandemic. Identify both broad-based and population-specific approaches to address community and individual needs.
5. Assess the need for services to address the stress and trauma that individuals, families and communities have experienced throughout the pandemic and how these effects may influence their participation in the workforce and performance on the job.
6. Assess the extent to which jobs with companies in the Bay Area, across the country, and around the world are now available to Central Valley residents. Whether these jobs are in customer service, information technology, or another field, what does the availability of work from home jobs suggest for training and education programs offered in the region?

### ***Demand Side Focus***

7. Determine the capacity in the region to support entrepreneurs through training, access to capital, and other resources/support.
8. As businesses express their evolving workforce needs to economic and workforce development professionals, including skills needed by workers, a strategy is required to communicate these needs rapidly to education partners to accelerate the enhancement/development and deployment of training to correspond to need.
9. Identify businesses' needs to retrain and/or upskill workers to meet new workplace demands, including changes brought about by the pandemic. Assess how commitment of limited resources to incumbent worker training will affect the balance of funding available to support individuals who are unemployed or are new entrants to the workforce.
10. Determine the extent to which small businesses, particularly those that are minority-owned, need support to recover, which may include for some, reopening strategies.

### ***Supply Side Focus***

11. Develop and implement training modules focused on communication, behaviors, and attitudes used during interactions (e.g., learning, interviews, meetings, work) via virtual platforms.
12. Develop options for addressing the lack of digital access experienced by individuals and communities throughout the Central Valley. Options must address the needs for access to the Internet, hardware, and digital literacy skills.
13. With warehousing, manufacturing, agriculture and other jobs in the Central Valley making increasing use of technology, including AI and robotics, what training is needed for incumbent workers and job seekers?

### ***Partnerships***

14. Identify additional opportunities for community-based organizations to more effectively connect to the workforce system and to serve as points of access to education and workforce programs that support underserved and vulnerable populations in preparing for jobs and careers.
15. Assess the need to enhance or expand partnerships with organizations that address issues that have been magnified as a result of the pandemic, such as homeless and/or housing insecurities, food insecurity, addiction, and mental health.

### ***Communications and Messaging***

16. Assess customer recognition and understanding of workforce services throughout the Central Valley and of the brands used by providers. Identify strategies to increase awareness and understanding of the workforce system by key customer groups.

### ***Regional Scaling of Locally Successful Models***

17. Identify populations, industries and initiatives that could benefit from the use of skilled Navigators to increase the effectiveness of services and to improve the outcomes achieved by job seekers and businesses.
18. Assess the replicability of apprenticeship programs that have been implemented in various local areas and determine the need for and feasibility of upscaling these programs throughout the region or to specific areas.
19. Examine local initiatives to develop workers' skills for an economy that is changing due to climate initiatives and determine how such training could be expanded regionwide.
20. Conduct a comprehensive assessment of services and training that have been implemented on virtual platforms and identify best practices that could be adopted throughout the region.

Progress at various levels is ongoing on all of the foregoing items and all remain part of the regional workforce agenda for the RPU.

### ***Additional Considerations Identified During Biennial Modification Process***

As part the process of preparing the 2023 Biennial Modification to the PY 21-24 Regional Plan, the Regional Organizer led efforts to secure input from workforce development stakeholders and the community about workforce issues affecting the Central Valley. As a result of this process (described in Appendix 1), which was largely focused on issues of equity, the following additional priority considerations were identified.

21. Identify opportunities to emphasize gender equity in key industries and occupations, particularly in support of women's entry to the workforce following exits during the pandemic.
22. Design strategies to increase the availability of services in rural and remote communities throughout the Central Valley.
23. Replicate models to increase inclusion of underserved populations in careers providing good wages and opportunities for advancement.

24. Replicate models from government, non-profit organizations, and the private sectors to increase diversity, equity, and inclusion.
25. Record and maintain information on strategies and models for effectively serving populations and industries so they can be easily reviewed, evaluated, and, as appropriate, replicated.

Several of the foregoing priority considerations are aligned with indicators established by the California Workforce Development Board that demonstrate coordination within the region. As indicated, it is the intention of local board leaders, over the four-year span of the Plan, to record and track efforts made in connection with these considerations.



|                         |
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| <b>VIII. APPENDICES</b> |
|-------------------------|

The following Items are Included as part of the Local Plan.

Attachment 1: Stakeholder and Community Engagement Summary

Attachment 2: Public Comments Received that Disagree with the Local Plan

Attachment 3: Signature Page

## **Stakeholder and Community Engagement Summary**

To facilitate the engagement of stakeholders in regional planning for the workforce development delivery system and the development of the original PY 2021-24 Regional Plan, the SJVAC RPU hosted a series of ten community and stakeholder forums focused on topics affecting strategies and services across the system. These forums included:

**The Regional Economy – Through the Eyes of Business and the Community:** The Four-Year Regional Plan will include an analysis of regional labor market data, growth industries and demand jobs. Workforce leaders, however, realize that data, no matter how recent, will not tell the full story of the regional economy, as COVID-19 has dramatically changed and continues to alter the economic landscape. As our Plan must address the goals of the workforce system from 2021 to 2025, we want to supplement statistics with local experiences told in the voice of workers, businesses, and stakeholders.

Forum on this topic were held via Zoom:

- December 17, 2020 (hosted by San Joaquin County WDB)
- January 7, 2021 (hosted by Madera County WDB)
- January 27, 2021 (conducted in Spanish and hosted by Stanislaus County WDB)
- One-hundred six (106) individuals attended these forums.

**Accelerating the Development of Career Pathways for Priority Sectors:** Regional stakeholders have worked to develop career pathway programs that are aligned with regional workforce needs and result in industry-recognized credentials. As we embark upon planning for the next four years, we must address how business, education, and the workforce system can work together to strengthen and expand the development of career pathway programs that reflect the needs of industry throughout the region.

Forum on this topic were held via Zoom:

- January 6, 2021 (hosted by Stanislaus County WDB)
- January 20, 2021 (hosted by Kern, Inyo, Mono WDB)
- Seventy (70) individuals attended these forums.

**Building a “Big Tent” Workforce System: Leaving no Worker Behind:** While the workforce system serves everyone, individuals with barriers to employment take advantage of the system less often than other Valley Residents. Workforce programs should be easily accessible to all and make certain that everyone has access to a marketable set of skills leading to good jobs that enable self-reliance.

Forum on this topic were held via Zoom:

- January 13, 2021 (hosted by Merced County WDB)
- January 14, 2021 (hosted by Fresno Regional WDB)
- February 3, 2021 (conducted in Spanish and hosted by Merced County WDB)
- One-Hundred forty-six (146) individuals attended these forums.

**Creating a Pathway to the Middle Class:** Imagine a workforce system capable of preparing every job seeker to enter a pathway to the middle class. Such a system would require unique approaches and strategies to eradicate barriers and build skills that businesses need to compete and grow.

Forum on this topic were held via Zoom:

- January 21, 2021 (hosted by San Joaquin County WDB)
- January 28, 2021 (hosted by Kings County WDB)
- Seventy-eight (78) individuals attended these forums.

As part of the process of developing the 2023 Biennial Modification to the Regional Plan, local boards again sought input from workforce development stakeholders and others on topics relevant to the Plan.

A session on “Tracking Equity Outcomes for Central Valley Workforce Programs” was developed, posing the following questions:

- What resources, tools, strategies, and approaches should the WDBs of the Central Valley make use of to fulfill their commitment to equity?
- Are there existing service models in the Central Valley or elsewhere that could help the workforce system clearly define expectations for equity, inclusion, and access?
- How will the stated principles support achievement of the equity statement?
- In addition to serving vulnerable populations in greater numbers, what performance criteria should be established to measure the region’s success in achieving “equity outcomes?”

Community forums to discuss these questions were held throughout the region as the update to the Plan was being developed. Sessions were conducted as follows:

- November 2, 2022 (hosted via teleconference by Kern-Inyo-Mono WDB)
- November 9, 2022 (hosted in person and via teleconference by San Joaquin County WDB)
- November 10, 2022 (hosted in person and via teleconference by Fresno Regional WDB)
- December 1, 2022 (conducted via teleconference in Spanish and hosted by Merced County WDB)

A total of 147 individuals participated in the forums.

| <b>Mode of Outreach</b>       | <b>Target of Outreach</b>                                | <b>Summary of Attendance</b> | <b>Comments</b>              |
|-------------------------------|--|------------------------------|------------------------------|
| Email, Social Media, Web Site | Fresno County Workforce Development Board                | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Kern Inyo Mono Counties Workforce Development Board      | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Kings County Workforce Development Board                 | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Madera County Workforce Development Board                | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Merced County Workforce Development Board                | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | San Joaquin County Workforce Development Board           | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Stanislaus County Workforce Development Board            | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Tulare County Workforce Investment Board                 | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Adult Education Consortium                               | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Adult Education/ Literacy                                | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Board of Supervisors                                     | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | CalFRESH/SNAP Providers                                  | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | California Department of Corrections and Rehabilitations | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | California Immigrant Policy Center                       | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | California Indian Manpower Consortium                    | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Career Technical Education                               | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Center for Business and Policy Research                  | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Center for Employment Opportunities                      | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Central Valley Immigrant Integration Collaborative       | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Central Valley Regional Center                           | Attended forums.             | Engaged in planning process. |
| Email, Social Media, Web Site | Chamber of Commerce                                      | Attended forums.             | Engaged in planning process. |

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| Email, Social Media, Web Site | Childcare Service Providers                                   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | City Ministry Network   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | City Planning and Development                                 | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | City, County and State Government Officials                   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Community Based Organizations                                 | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Community Leaders   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Community Partnerships for Families                           | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Community Services Corporation – Kern Women’s Business Center | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | County Office of Education                                    | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Del Puerto Health Care District                               | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Delta Sierra Adult Education Alliance                         | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Department of Behavior Health                                 | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Department of Child Support Services                          | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Department of Economic Development                            | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Department of Human Services                                  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Department of Probation                                       | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Department of Rehabilitation                                  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Department of Social Services                                 | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Disability Services   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Division of Apprenticeship Standards                          | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Education and Leadership Foundation                           | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Employment Development Department                             | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Employment Training Panel                                     | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | English Language Learners Organizations                       | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Equus Workforce Solutions                                     | Attended forums. | Engaged in planning process. |

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| Email, Social Media, Web Site | Faith Based Organizations  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Fresno Business Council  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Gateway Adult Education Network  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Goodwill Industries  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Healthcare Organizations   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Housing Authority  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Immigration Services   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Justice Involved Organizations   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | K-12 Education   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Labor Organizations  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | LearningQuest  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Members of the Public  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Municipalities   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Opportunity Stanislaus   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | OVCDC Tribal TANF  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Private Business   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Proteus Inc.   | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Resource Development Associates  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Small Business Development Center  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Stanislaus Community Foundation  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | State Center Adult Education Consortium  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Superintendents and Administrators of Educational Organizations including Adult Schools, Community Colleges, State 4-Year Universities, Private Colleges | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | The Fresno Center  | Attended forums. | Engaged in planning process. |
| Email, Social Media, Web Site | Tulare Employment Connection   | Attended forums. | Engaged in planning process. |

|                                  |                                    |                  |                                 |
|----------------------------------|------------------------------------|------------------|---------------------------------|
| Email, Social Media,<br>Web Site | Valley Mountain<br>Regional Center | Attended forums. | Engaged in planning<br>process. |
|----------------------------------|------------------------------------|------------------|---------------------------------|



# JOIN US! Help plan for the future of the Valley workforce



SOUTH VALLEY SUB-REGION COMMUNITY FORUM

## TRACKING EQUITY OUTCOMES FOR CENTRAL VALLEY WORKFORCE PROGRAMS

Hosted by Kern, Inyo & Mono Workforce Development Board



November 2, 2022 | 3:00 pm | Virtual Meeting



## The Voice of the Central Valley is Vital

Across the Central Valley, eight local Workforce Development Boards have developed the following equity statement:

**“THE LOCAL BOARDS OF THE CENTRAL VALLEY ARE COMMITTED TO DIVERSITY, INCLUSION, EQUITY AND ACCESS IN EVERY ASPECT OF THEIR OPERATIONS AND PROGRAMS”**

The community is invited to join workforce system stakeholders, businesses, and others from the community as we define the Equity outcomes we would like to achieve.



## Save the Date *hosted by Kern, Inyo & Mono Workforce Development Board*

**Sub-Regional Community Forum:** Tracking Equity Outcomes for Central Valley Workforce Programs

**When:** Wednesday, November 2, 2022 from 3:00 pm to 4:00 pm

**Where:** Come join us at Zoom on the computer at <https://tinyurl.com/mpeph2wu> or on the phone at +1 669 900 9128



Coordinated by Stanislaus County Workforce Development | [stanworkforce.com](http://stanworkforce.com) | (209) 558-2100 | @stanworkforce



This program is fully funded with the Regional Plan Implementation 4.0 grant totaling \$326,805 (100%) from the U.S. Department of Labor and is an equal opportunity employer/program. Auxiliary Aids and services are available upon request to individuals with disabilities.



# JOIN US! Help plan for the future of the Valley workforce



NORTH VALLEY SUB-REGION COMMUNITY FORUM

## TRACKING EQUITY OUTCOMES FOR CENTRAL VALLEY WORKFORCE PROGRAMS

Hosted by San Joaquin County WorkNet



November 9, 2022 | 3:00 pm | In-Person Meeting



## The Voice of the Central Valley is Vital

Across the Central Valley, eight local Workforce Development Boards have developed the following equity statement:

**“THE LOCAL BOARDS OF THE CENTRAL VALLEY ARE COMMITTED TO DIVERSITY, INCLUSION, EQUITY AND ACCESS IN EVERY ASPECT OF THEIR OPERATIONS AND PROGRAMS”**

The community is invited to join workforce system stakeholders, businesses, and others from the community as we define the Equity outcomes we would like to achieve.



## Save the Date *hosted by San Joaquin County WorkNet*

**Sub-Regional Community Forum:** Tracking Equity Outcomes for Central Valley Workforce Programs

**When:** Wednesday, November 9, 2022 from 3:00 pm to 4:30 pm

**Where:** Come join us at 6221 West Lane, Stockton, CA 95210 or on Microsoft Teams on the computer at <https://tinyurl.com/ycks2er9> or on the phone at +1 209-645-4071 (Conference ID: 159 382 027#)



Coordinated by Stanislaus County Workforce Development | [stanworkforce.com](http://stanworkforce.com) | (209) 558-2100 | @stanworkforce



This program is fully funded with the Regional Plan Implementation 4.0 grant totaling \$326,805 (100%) from the U.S. Department of Labor and is an equal opportunity employer/program. Auxiliary Aids and services are available upon request to individuals with disabilities.



# JOIN US! Help plan for the future of the Valley workforce



MID-VALLEY SUB-REGION COMMUNITY FORUM

## TRACKING EQUITY OUTCOMES FOR CENTRAL VALLEY WORKFORCE PROGRAMS

Hosted by Fresno Regional Workforce Development Board



November 10, 2022 | 10:30 am | In-Person Meeting



## The Voice of the Central Valley is Vital

Across the Central Valley, eight local Workforce Development Boards have developed the following equity statement:

**“THE LOCAL BOARDS OF THE CENTRAL VALLEY ARE COMMITTED TO DIVERSITY, INCLUSION, EQUITY AND ACCESS IN EVERY ASPECT OF THEIR OPERATIONS AND PROGRAMS”**

The community is invited to join workforce system stakeholders, businesses, and others from the community as we define the Equity outcomes we would like to achieve.



## Save the Date *hosted by Fresno Regional Workforce Development Board*

**Sub-Regional Community Forum:** Tracking Equity Outcomes for Central Valley Workforce Programs

**When:** Thursday, November 10, 2022 from 10:30 am to 12:00 pm

**Where:** Come join us at 3170 W. Shaw Avenue, Fresno, CA 93711 or on Zoom on the computer at <https://tinyurl.com/44ctrm3d> or on the phone at +1 669 900 9128



Coordinated by Stanislaus County Workforce Development | [stanworkforce.com](http://stanworkforce.com) | (209) 558-2100 | @stanworkforce



This program is fully funded with the Regional Plan Implementation 4.0 grant totaling \$326,805 (100%) from the U.S. Department of Labor and is an equal opportunity employer/program. Auxiliary Aids and services are available upon request to individuals with disabilities.



# ÚNETE A NOSOTROS! Ayúdanos a planificar el futuro de la fuerza laboral del Valle



FORO COMUNITARIO SUBREGIONAL DEL VALLE SUR

## SEGUIMIENTO DE RESULTADOS DE EQUIDAD PARA LOS PROGRAMAS DE LA FUERZA LABORAL DEL VALLE CENTRAL

Presentado por la Junta de la Fuerza Laboral de Merced



1 de diciembre, 2022 | 3:00 pm | Junta Virtual



## LA VOZ DEL VALLE CENTRAL ES VITAL

En todo el Valle Central, ocho Juntas del Desarrollo de la Fuerza Laboral han desarrollado la siguiente declaración de equidad:

**“LAS JUNTAS LOCALES DEL VALLE CENTRAL ESTÁN COMPROMETIDOS CON LA DIVERSIDAD, LA INCLUSIÓN, EQUIDAD Y ACCESO EN CADA ASPECTO DE SUS OPERACIONES Y PROGRAMAS”**

Se invita a la comunidad a unirse a las partes interesadas del sistema laboral, las empresas y otras personas de la comunidad a medida que definimos los resultados de equidad que nos gustaría lograr.



## Reserva la Fecha

Presentado por la Junta de la Fuerza Laboral de Merced

**Foro Comunitario Subregional:** Seguimiento de Resultados de Equidad de los Programas de la Fuerza Laboral del Valle Central

**Cuando:** : Jueves, 1 de diciembre, 2022 de 3:00 pm - 4:00 pm

**Dónde:** Únete a nosotros en la computadora por Zoom en la página: <https://tinyurl.com/mpeph2wu> o por telefono al +1 669 900 9128



Coordinado por el Departamento de la Fuerza Laboral del Condado de Stanislaus | [stanworkforce.com](http://stanworkforce.com) | (209) 558-2100 | [f](https://www.facebook.com/stanworkforce) [in](https://www.linkedin.com/company/stanworkforce) @stanworkforce

Este programa está totalmente financiado con el otorgo de Implementación del Plan Regional 4.0 por un total de \$326,805 (100%) y es un empleador/programa de igualdad de oportunidades. Las ayudas y los servicios auxiliares están disponibles a pedido de las personas con discapacidades.

America's **JobCenter**  
of California<sup>SM</sup>



|   |
|---|
| <b>PUBLIC COMMENTS RECEIVED THAT DISAGREE WITH THE 2023 BIENNIAL<br/>MODIFICATION TO THE PY 2021-24 REGIONAL PLAN</b> |
|---|

|                        |                     |                     |
|------------------------|---------------------|---------------------|
| 1.                     | <i><b>From:</b></i> | <i><b>Date:</b></i> |
| <i><b>Comment:</b></i> |                     |                     |

|                        |                     |                     |
|------------------------|---------------------|---------------------|
| 2.                     | <i><b>From:</b></i> | <i><b>Date:</b></i> |
| <i><b>Comment:</b></i> |                     |                     |

|                       |
|-----------------------|
| <b>SIGNATURE PAGE</b> |
|-----------------------|

The following signatures represent approval of the San Joaquin Valley Regional Planning Unit's 2023 Biennial Modification to the PY 2021-24 Regional Plan by the eight workforce development Boards that comprise the region.

For the **Fresno Regional Workforce Development Board**:

|                   |
|-------------------|
|                   |
| Local Board Chair |
| Date              |

For the **Kern County Employers' Training Resource**:

|                   |
|-------------------|
|                   |
| Local Board Chair |
| Date              |

For the **Kings County Job Training Office**:

|                   |
|-------------------|
|                   |
| Local Board Chair |
| Date              |

For the **Workforce Development Board of Madera County**

|                   |
|-------------------|
|                   |
| Local Board Chair |
| Date              |

|                               |
|-------------------------------|
| <b>SIGNATURE PAGE (cont.)</b> |
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For the **Merced County Workforce Development Board**:

|   |                   |      |
|---|-------------------|------|
|   |                   |      |
| <table style="width: 100%;"> <tr> <td style="width: 70%;">Local Board Chair</td> <td style="width: 30%;">Date</td> </tr> </table> | Local Board Chair | Date |
| Local Board Chair   | Date              |      |

For the **San Joaquin County Employment and Economic Development Department**:

|   |                   |      |
|---|-------------------|------|
|   |                   |      |
| <table style="width: 100%;"> <tr> <td style="width: 70%;">Local Board Chair</td> <td style="width: 30%;">Date</td> </tr> </table> | Local Board Chair | Date |
| Local Board Chair   | Date              |      |

For the **Stanislaus County Workforce Development Board**:

|   |                   |      |
|---|-------------------|------|
|   |                   |      |
| <table style="width: 100%;"> <tr> <td style="width: 70%;">Local Board Chair</td> <td style="width: 30%;">Date</td> </tr> </table> | Local Board Chair | Date |
| Local Board Chair   | Date              |      |

For the **Workforce Investment Board of Tulare County**:

|   |                   |      |
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|   |                   |      |
| <table style="width: 100%;"> <tr> <td style="width: 70%;">Local Board Chair</td> <td style="width: 30%;">Date</td> </tr> </table> | Local Board Chair | Date |
| Local Board Chair   | Date              |      |



## **Madera Workforce Development Board AJCC Q2 22-23 Report:**

*Report created by One Stop Operator, Gary Beaudette of Beaudette Consulting Inc.*

The Madera Workforce Assistance Center partnership meets monthly. The following agencies are invited to participate in each meeting, which are planned and facilitated by Beaudette Consulting Inc.:

### **Madera County Partners:**

|   |   |
|---|---|
| California Indian Manpower Consortium, Inc.   | Madera County Workforce Investment Corporation        |
| Central Valley Opportunity Center             | Madera Unified School District Madera Adult School    |
| Housing Authority of Madera County            | Reading and Beyond                                    |
| Job Corps                                     | State Center Adult Education Consortium               |
| Madera Community College Center               | State of California Department of Rehabilitation      |
| Madera County Department of Social Services   | State of California Employment Development Department |
| Madera County Economic Development Commission |   |



### **Our Partner Meetings:**

The purpose of our meetings is to get all partners aligned to a shared vision, enhance cross-agency communication flow, and accomplish our objectives and goals.

- We met on the following dates this quarter:
  - October 12<sup>th</sup>, 2022
  - November 9<sup>th</sup>, 2022
  - December 14<sup>th</sup>, 2022

### **This Quarters Meeting Topic Overview:**

- Introductions – Roll Call
- How is your agency doing? How do you know?
  - (We share key performance indicators and goals during this portion in order to quantify success, problems, or to open up communication to ask for help)
- Partner Announcements: Staff changes
- Partner Events: reviews or notice of upcoming events
- Strategic Plan: review or updates
- Business Services: report outs, or decisions
- Open Discussion
  - Decisions, problems, or ideas

## **Q2 Highlights:**

- Partners staying united together through the challenges of the Covid pandemic, making adjustments, and keeping a positive attitude through various changes.
- Partners sharing job opportunities cross-collaboratively
- Open communication, discussing best practices and lessons learned
- High attendance – representation
- Willingness to help each other
- Safe environment to express ideas or ask for help

## **Opportunities:**

The biggest opportunity is to get all partners to provide me with data. I have been collecting Key Performance Indicator data by each specific agency on the following:

1. How many people did your organization help find a job?
2. How many people did your organization place into educational or occupational skills training?
3. How many people did your organization help to earn a postsecondary certificate or degree?
4. How many people did your organization provide guidance on how to make career choices?
5. How many jobs did your organization help businesses fill when they were seeking to hire skilled workers

I created a spreadsheet template to collect the data, and it is housed on our Google Share Drive which the link has been emailed out to all partners and can be accessed here [\(Link\)](#)

As of the end of Q2 we only have data from 4 of our 13 partners. I will continue to get data collected in Q3.

The second biggest opportunity is to get all partners on one electronic shared referral system, Unite Us is what we decided on. Right now, we have 5 out of 13 partners utilizing Unite Us, and our goal is to have all 13 partners using Unite Us by the end of Q3.

Below are other opportunities for us as an AJCC to work on improving in the next quarter and beyond:

- Utilization of the Google Share Drive
  - Inputting data for agency specific performance metrics
- 
- Coming prepared to meetings with performance data
- Engagement with business partners and local businesses engaged in the business services and relaying information on what skills they are hiring for.



## **Next Steps**

- Create Cross-Training Videos (customer facing)
- Report out on WDB Goal Progress.
- Continuous Improvement visibility: I believe that an opportunity is to put our Continuous Improvement projects into a project management board such as Trello, so we can keep track of our progress.
- Celebrating Success: Our team should decide on how we should celebrate goals that we achieve, it doesn't have to cost money, but just a nice way to recognize the teams' accomplishments.



## Agenda Item 8.1

☐ Consent

☐ Action

☒ Information

**To:** Workforce Development Board of Madera County  
**From:** Maiknue Vang, Executive Director  
**Date:** February 16, 2023  
**Subject:** Workforce Development Board Workshop: Program & Data Reports

### **Information:**

Staff are relaunching the Program Impact and Data Reports and request WDB member input on what information the Board would like to see included in these reports. Previously, the Program Impact Report was provided annually, and the Data Report was provided quarterly. Examples of Program and Data reports from Solano County WDB and Tulare County WDB are provided for reference and discussion. Board members will have the opportunity to select the most important 1-3 areas for focused data collection during the meeting.

### **Financing:**

Workforce Innovation and Opportunity Act



WORKFORCE DEVELOPMENT  
BOARD OF MADERA COUNTY

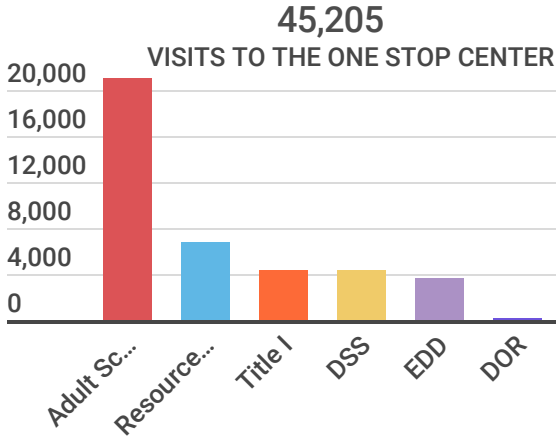
# FY 2018/2019

AGENDA ITEM 8.1

## PROGRAM IMPACT REPORT

July 1, 2018 - June 30, 2019

The Madera County Workforce Assistance Center is a partnership of community agencies specializing in meeting a variety of education, skill development, and employment needs.



256

Job Readiness

Workshop Attendees

19,711

Services Provided  
to individuals



## Job Seeker Demographics

The Workforce Development Board of Madera County serves a diverse job seeker base. Numbers below represents individuals enrolled in WIOA Adult, Dislocated Worker and Youth programs.

### AGE

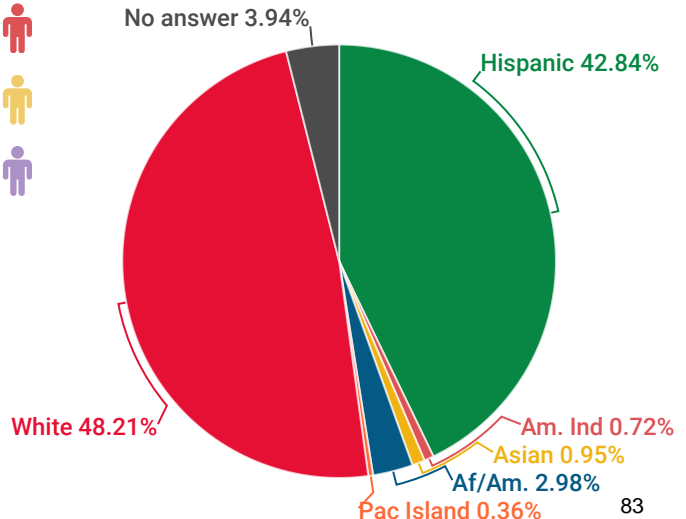


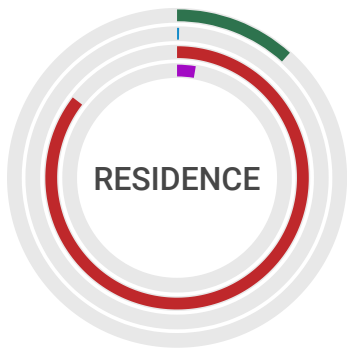
16-21 (20.40%) 22-32 (40.35%)

33-44 (21.27%) 45-54 (11.62%)

55+ (6.35%)

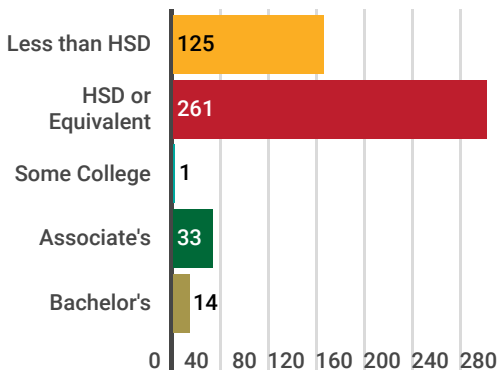
### RACE/ ETHNICITY





● Chowchilla (53) ● Friant (1)  
● Madera (388) ● Eastern Madera (12)

## EDUCATIONAL ATTAINMENT



# JOB SEEKER IMPACTS

## ENROLLMENTS



**456**  
Enrolled in WIOA

Employed - 2nd Quarter After Exit

**64.7%** ADULT (119/184)

**76.6%** DISLOCATED WORKER (36/47)

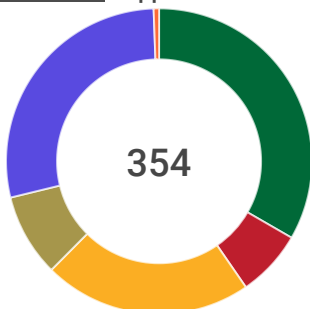
**65.7%** YOUTH (23/35)



**203** Training Services

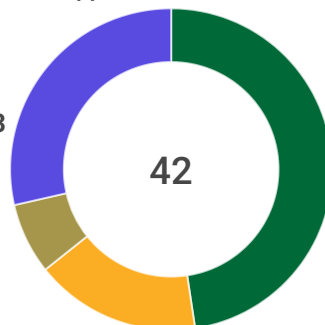
## ADULT/DW Supportive Services

Total Cost  
\$44,049.77



## YOUTH Supportive Services

Total Cost  
\$13,472.13



● Transportation 118 ● Medical 25 ● Other 78  
● Tools/Clothing 31 ● Educational Testing 100  
● Academic Materials 2

● Transportation 20 ● Other 7  
● Tools/Clothing 3 ● Educational Testing 12

## OUTCOMES



Average Wage at Exit

DW: **\$12.65**

Youth: **\$12.59**

Adult: **\$14.27**

**187** Employed 4th Qtr After Exit



Total Wages  
1,192,154.35 - Total wages  
6,375.20 - Average earnings



**5,967**

Median Earning  
for 4th Quarter after exit

## Skills Training/On-the-Job Training/ Transitional Job Training by Sector



Transportation/Logistics= 43



Manufacturing= 18



Healthcare= 26



General Business= 28



Hospitality= 4



Child Development= 1



Security Guard= 1



Maintenance= 5



Computer Support IT= 2



Retail= 2

## INVESTMENTS

**\$4,611**

Average Cost Per  
Job Seeker Served



**\$3,000**

Average Cost  
Per Training

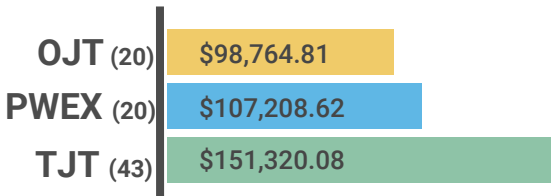


**83**

Industry Recognized/  
Post Secondary Certificate



## Business Services



**569**

Internal Job Orders  
Created

**912**

Services Provided  
to Businesses

**3**

Job Fairs

**415** Businesses  
Served



**79**

Employers

**616**

Job Seeker Attendees



**29**

Business Outreach  
Campaigns



WORKFORCE DEVELOPMENT  
BOARD OF MADERA COUNTY

Workforce Development Board of Madera County

2037 W. Cleveland Ave

Madera, CA 93637

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



**WORKFORCE DEVELOPMENT BOARD**  
OF SOLANO COUNTY

# FY2022 Q4 PROGRAMMATIC IMPACT

AGENDA ITEM 8.1

July 2021 - June 2022



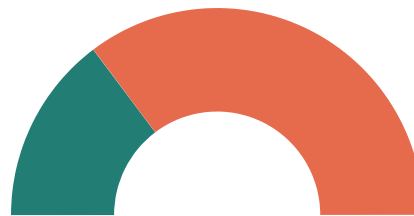
The America's Job Centers of California (AJCC) consists of partners who operate the job centers include Employment Development Department, the WDB, Division of Rehabilitation, and others.

**15,507** INDIVIDUALS  
VISITED THE JOB CENTERS

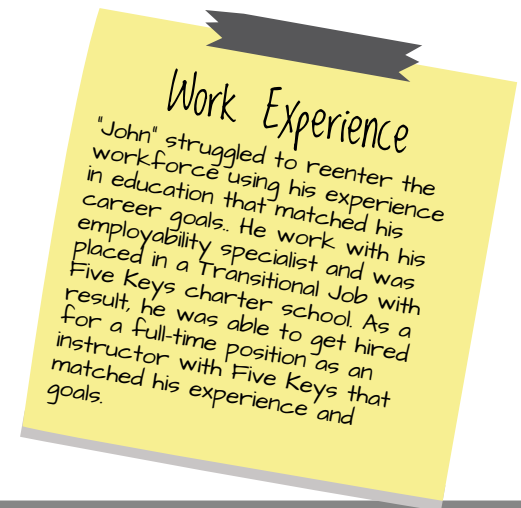
**184** INDIVIDUALS  
VISITED COMMUNITY SITES

**36,628** SERVICES  
PROVIDED

## JOB CENTER TRAFFIC BY LOCATION



■ Vallejo (29.48%) ■ Fairfield (70.52%)



## Job Seeker Demographics

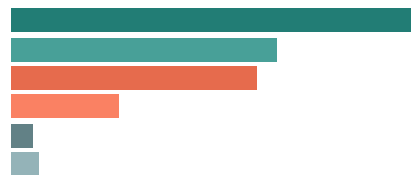
The Workforce Board serves a diverse job seeker base. Numbers below represent individuals enrolled in Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker, and Youth programs.

### AGE



■ 16-24 (28.85%) ■ 25-32 (17.31%)  
■ 33-44 (18.59%) ■ 45-54 (19.23%)  
■ 55+ (16.03%)

### RACE/ETHNICITY



■ Af/Amer ■ White ■ Hispanic  
■ Asian ■ Pac Island ■ Amer Ind

### PRIORITY POPULATIONS



**2%** BASIC SKILLS DEFICIENT



**26%** CALFRESH RECIPIENTS



**0%** ENGLISH LANGUAGE



**35%** INDIVIDUALS W/ DISABILITY



**11%** JUSTICE-INVOLVED

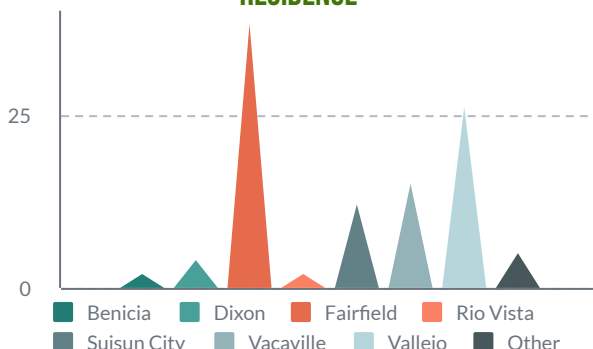


**1%** HOMELESS

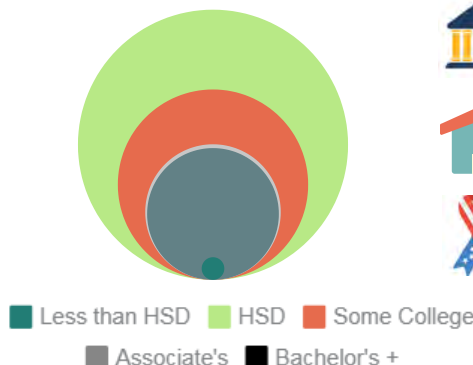


**14%** VETERANS

### RESIDENCE



### EDUCATIONAL ATTAINMENT

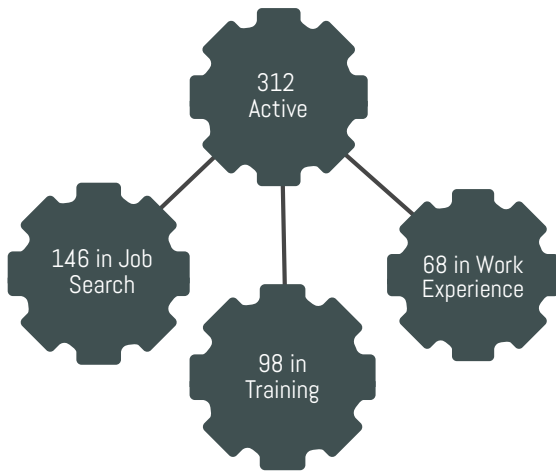




# Intensive Services

Intensive services for enrolled individuals include occupational training, paid work experience, job search support, supportive services, and job coaching. Activities and outcomes represent WIOA and State-funded individuals.

## CUSTOMER ACTIVITIES



**64** Individuals Received Supportive Services

## CUSTOMER OUTCOMES



**173** Newly Enrolled

**75** Individuals Started Training



**57** Individuals Received Industry Certifications

**130** Individuals Employed

**\$22.93**  
Average Wage

**65%**  
TRAINING-RELATED  
PLACEMENTS  
17 out of 26

**53%**  
SOLANO COUNTY  
PLACEMENTS  
vs. **35%** Solano Co. average\*

### Top Industries



**15%**



**11%**



**12%**



**8%**

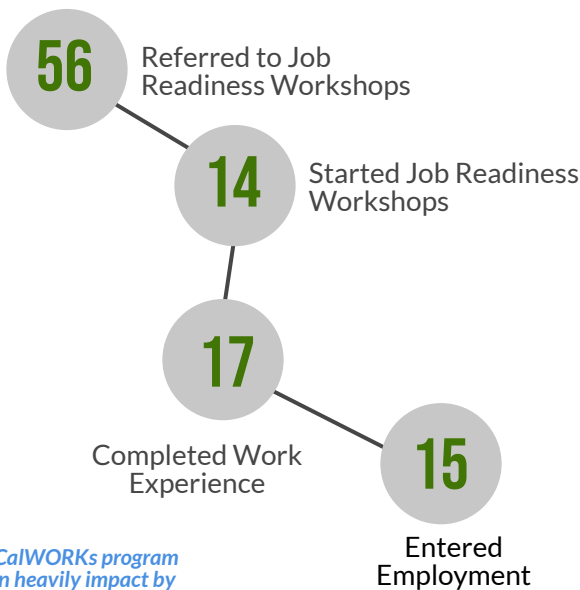


**\$8.95/HR**

Ave. Increase in Wages  
After Using WDB Services



## CalWORKs



**NOTE:** CalWORKs program has been heavily impacted by COVID-19.

## Business Engagement

WDB staff members engage with the business community to better serve the workforce needs of the county.

**465** Active Business Engagements

**195** New Businesses Engaged

**698** Job Postings through Staff

**37** Recruitment Events Held

**Industry Skills**  
The WDB has been working with businesses in key industries to develop rapid industry-based skills training programs in partnership entities. This summer, the WDB will launch a manufacturing internship and a culinary training cohort with our local businesses.

**\$56,103**  
Invested in Solano County Businesses talent needs



Workforce Development Board of Solano County  
500 Chadbourne Rd, Suite 100, Fairfield, CA 94534  
<http://solanoemployment.org>



## Agriculture

AGENDA ITEM 8.1

January, 2020



In California, the average farm size is 313 acres, with a total of 81,033 farms in the state, 64,000 of those are owned by families.

<https://www.maderafb.com/about/county-ag-stats/>



In 2018 the gross value of production was \$2,058,474,000 up from \$85,025,000 the previous year.

<https://www.maderacounty.com/home/showdocument?id=17417>

## Top 3 commodities in Madera County



Almonds



Grapes



Pistachios

<https://www.maderacounty.com/home/showdocument?id=17417>

## Top Leading Crops and 2018 Value in Madera

| Commodity           | 2018 Rank | 2018 Dollar Value |
|---------------------|-----------|-------------------|
| Almonds, Nuts       | 1         | \$730,662,000     |
| Grapes              | 2         | \$307,655,000     |
| Pistachios          | 3         | \$296,602,000     |
| Milk                | 4         | \$279,799,000     |
| Pollination         | 5         | \$56,160,000      |
| Cattle & calves     | 6         | \$51,204,000      |
| Tomatoes            | 7         | \$31,709,000      |
| Replacement Heifers | 8         | \$28,560,000      |
| Nursery Stock       | 9         | \$27,969,000      |
| Poultry             | 10        | \$26,504,000      |

<https://www.maderacounty.com/home/showdocument?id=17417>



MILK is one of the top 5 commodities in Fresno, Kings, Madera, Merced. and Tulare Counties.

<https://www.fresnostate.edu/craig/ubc/documents/cencal/2018/6%20Agriculture.pdf>

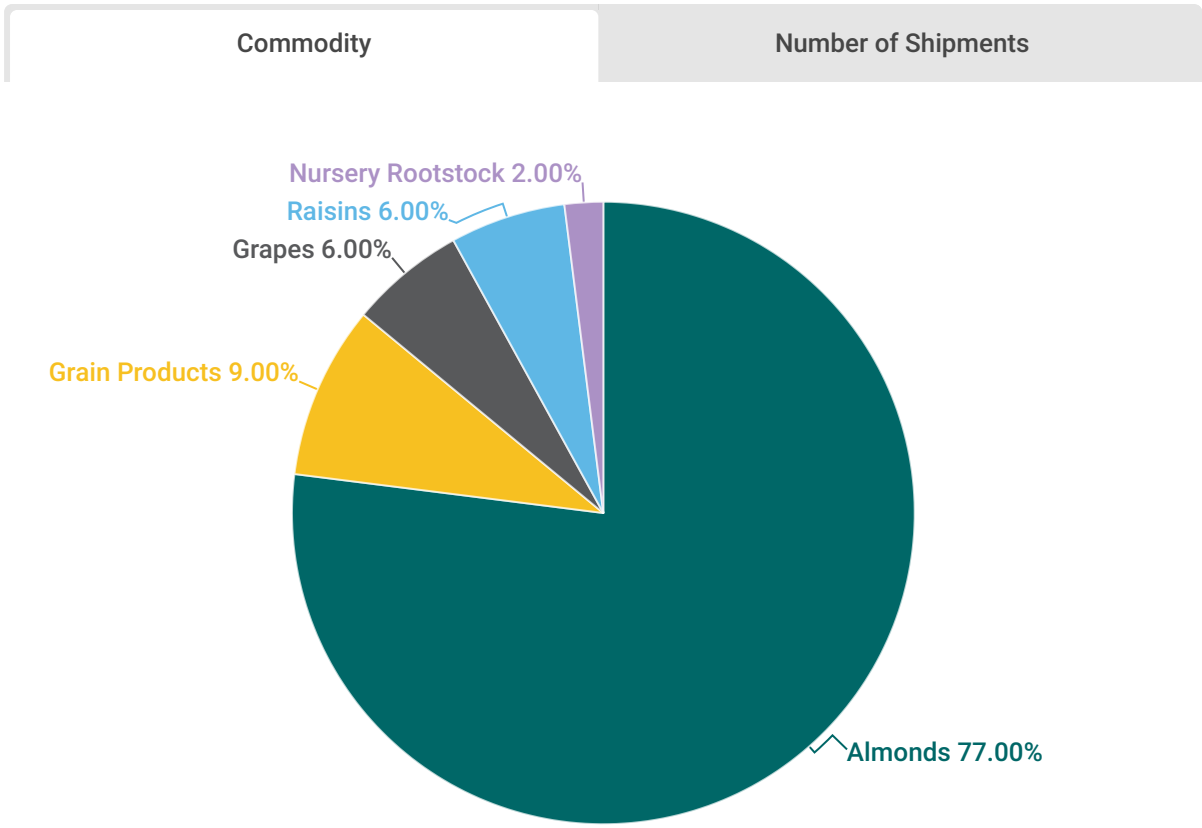




# In 2018, 142,000 Acres were harvested in Madera County

<https://www.maderacounty.com/home/showdocument?id=17417>

## 5 Leading Commodities Exported



<https://www.maderacounty.com/home/showdocument?id=17417>



## 76 Countries received Madera County Commodities in 2018

<https://www.maderacounty.com/home/showdocument?id=17417>

### Business Resources & Services

- OJT - The On-The-Job training program enables businesses to hire new employees and receive a reimbursement to offset a portion of the training costs during the training period.
- TJT - Transitional Job Training program is a subsidized work-based training activity that takes place at a work site for a limited period of time.
- Tax Credits - Work Opportunity Tax Credit is available for employers who hire individuals who are members of federally designated groups.
- PWEX - The Paid Work Experience is a temporary work placement activity in a public, private or non-profit organization. PWEX provides individuals with an opportunity to gain on the job knowledge, experience and technical skills, while earning a minimum wage.

### Our Mission

To empower and develop a highly skilled workforce by providing specialized support and resources to our customers, partners, and employers, ensuring economic prosperity.

Workforce Development Board of Madera County  
2037 W. Cleveland Ave  
Madera, CA 93637  
(559) 662-4500

Visit us on the web at: [www.Maderaworkforce.org](http://www.Maderaworkforce.org)



VOLUME 7, ISSUE 12 | DECEMBER 2022

# WORKFORCE DATA NEWSLETTER

*an In-Depth Analysis of Labor Market Information*

## From December 2021 to December 2022...



**UNEMPLOYMENT RATE**  
increased by **0.1%**



**FARM JOBS**  
increased by **300**



**LARGEST GAIN:**  
food services & drinking places | **800**



**LABOR FORCE**  
increased by **3,000**



**NON FARM JOBS**  
increased by **3,400**



**LARGEST DECLINE**  
transportation, warehousing, & utilities | **300**

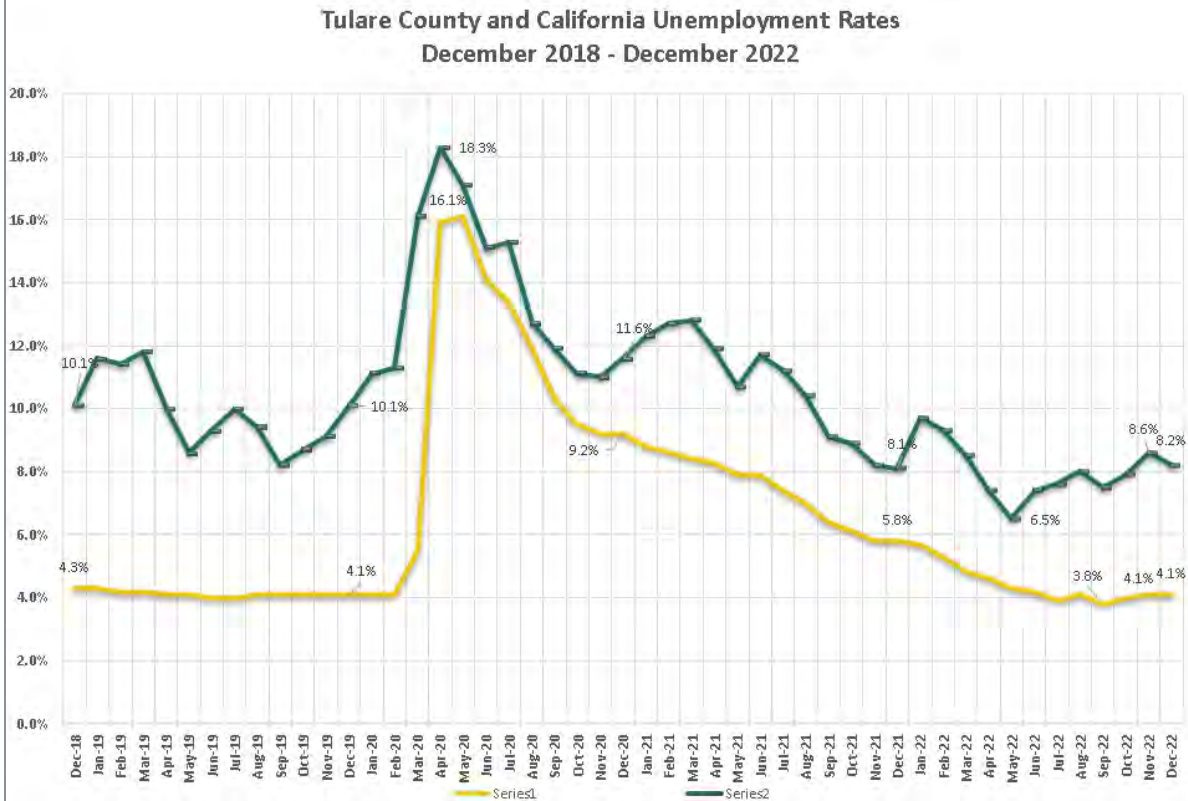
## Highlights from the recent report include:

- From December 2021 to December 2022, the unemployment rate in Tulare County increased by 0.1 percent; the year-over-year unemployment rate increase is a result of labor force growth outpacing employment growth.
- From December 2021 to December 2022, the labor force increased by 3,000 while employment increased by 2,700.
- The labor force size of 203,900 in December 2022 is the largest December labor force recorded in Tulare County.

- In December 2022, Tulare County saw record high employment for the following industries: Nondurable Goods (Manufacturing), Educational & Health Services, Accommodation, and Other Services.

## Employment in Tulare County vs. California

HOW DOES TULARE COUNTY'S UNEMPLOYMENT RATE CHANGE OVER TIME?



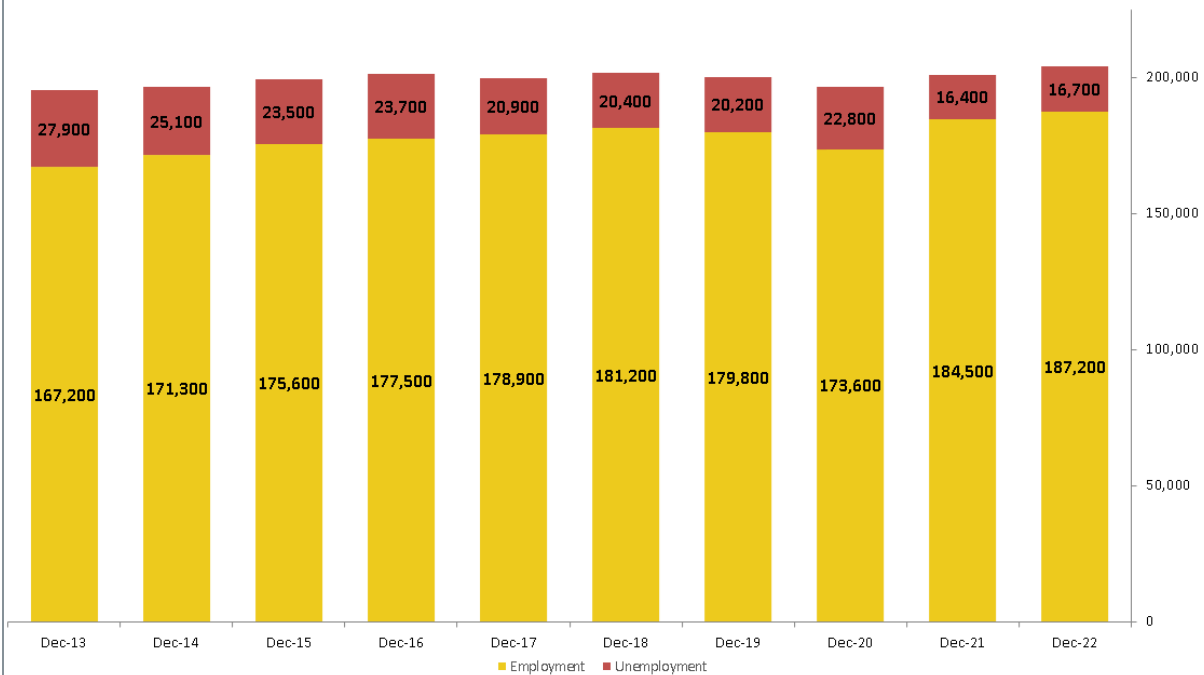
The California Employment Development Department (EDD) reported a 0.1 percent increase in Tulare County's unemployment rate, from a revised 8.1 percent in December 2021 to 8.2 percent in December 2022.

Over the last ten years, the average month-over-month unemployment rate from November to December increased by 0.9 percent. This year, however, the month-over-month unemployment rate decreased by 0.4 percent

|              | December 2021 | November 2022 | December 2022 | Change |       |
|--------------|---------------|---------------|---------------|--------|-------|
|              |               |               |               | Month  | Year  |
| Labor Force  | 200,900       | 205,500       | 203,900       | -1,600 | 3,000 |
| Employment   | 184,500       | 187,900       | 187,200       | -700   | 2,700 |
| Unemployment | 16,400        | 17,600        | 16,700        | -900   | 300   |

The graph below shows the trends in December employment and unemployment over the last 10 years. In December of 2022, there were 203,900 people in the labor force.

Employment & Labor Force Trends in Tulare County



## Gains + Losses | The Number of Jobs in Tulare County

HOW MANY JOBS HAVE COME AND GONE IN THE LAST YEAR & THE LAST MONTH?

## YEAR OVER YEAR | A COMPARISON

From December 2021 to December 2022, Food Services & Drinking Places saw the greatest year-over numerical gain with an increase of 800 jobs, while Arts, Entertainment, & Recreation showed the greatest percent gain with job growth of 25.0 percent. Transportation, Warehousing & Utilities showed the greatest year-over numerical and percent decline with a loss of 300 jobs, or 3.0 percent of jobs.

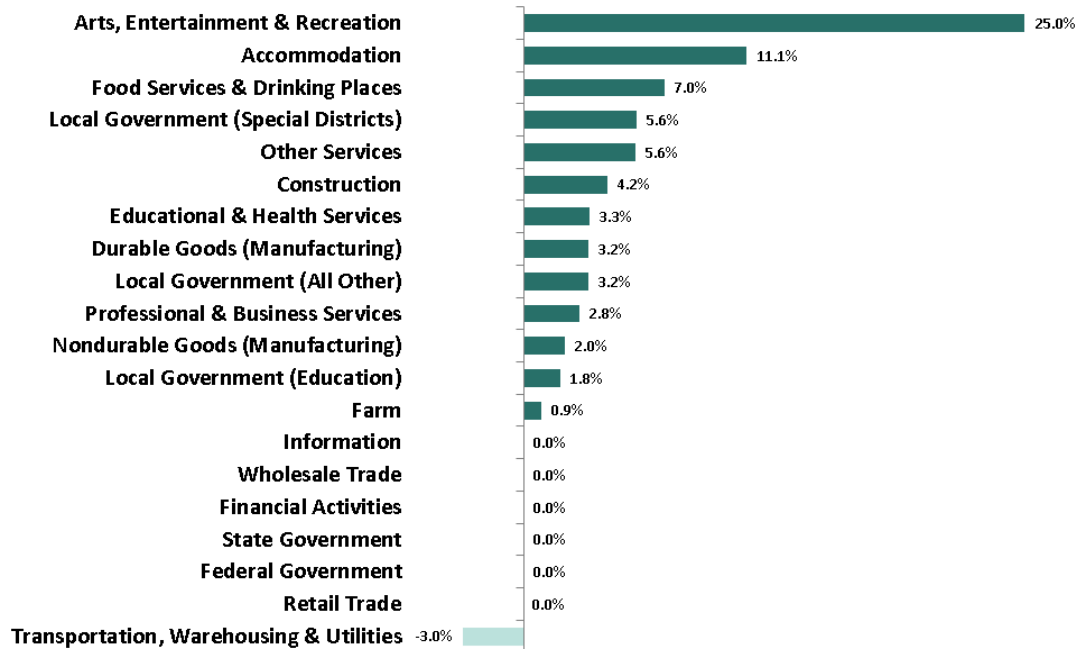
## Tulare County 2021-2022 Change in Jobs

December 2021 - December 2022



## Tulare County 2021-2022 Percent Change in Jobs

December 2021 - December 2022



## MONTH OVER MONTH | A COMPARISON

From November to December 2022, Local Government (All Other) showed the greatest numerical and percent gains with an increase of 100 jobs, or job growth of 1.6 percent. Farm showed the greatest month-over numerical and percent decline with a loss of 2,400 jobs, or 6.5 percent of jobs.

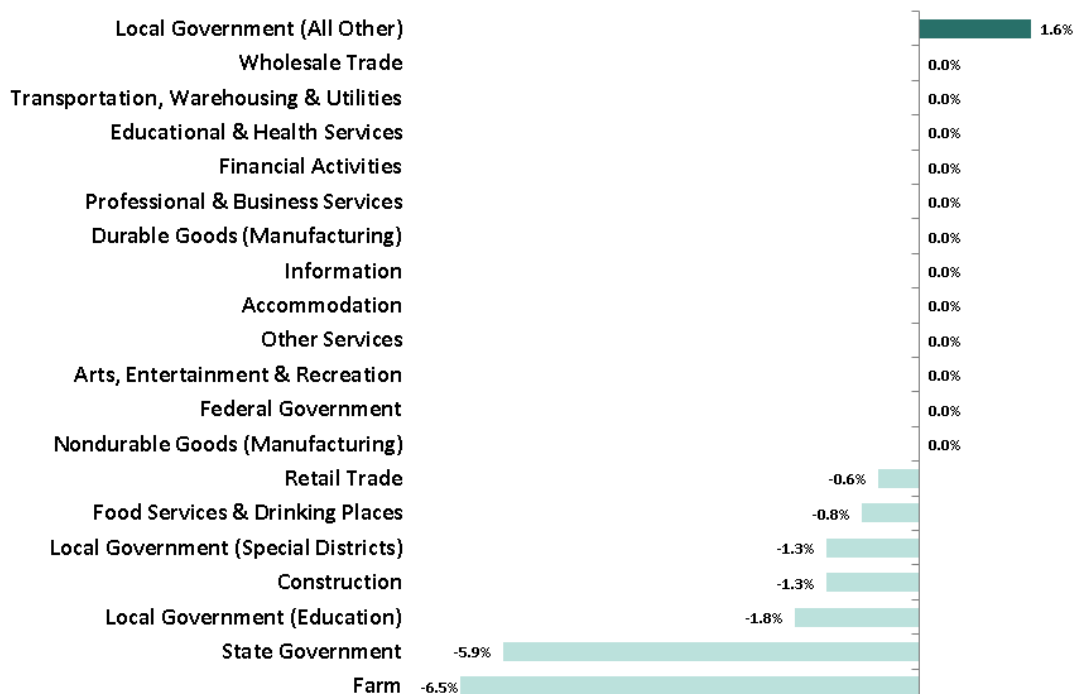
### Tulare County Month-Over Change in Jobs

November 2022 - December 2022



### Tulare County Month-Over Percent Change in Jobs

November 2022 - December 2022



The employment data referenced in this newsletter is provided by the Employment Development Department of California.



## ***we're your data hub***

The Workforce Investment Board of Tulare County strives to bring you accurate and understandable data on workforce intelligence, industry trends, and labor market insight.

Please visit [www.tularewib.org](http://www.tularewib.org) to learn more about our initiatives in Tulare County.

**Let's Connect!**  
LIKE US | TWEET US





## Agenda Item 8.2

☐ Consent

☐ Action

☒ Information

**To:** Workforce Development Board of Madera County  
**From:** Maiknue Vang, Executive Director  
**Date:** February 16, 2023  
**Subject:** Update on Madera Community Hospital Closure and Rapid Response

### **Information:**

We received a WARN notification for the closure of the Madera Community Hospital effective as early as December 30, 2022. 772 employees across all positions were impacted at various locations across Madera, Chowchilla, and Mendota sites. Our Rapid Response team comprised of MCWIC, EDD, DSS, Behavioral Health, Cost U Less Insurance, and Covered California conducted 11 RR orientations and saw approximately 200 impacted employees.

In partnership with the Fresno WDB, we hosted a job fair at the AJCC on January 11, from 9am-12pm for MCH employees. We had 12 employers in attendance who were ready to hire for multiple health related positions. Additionally, Camarena Health, St. Agnes, and Community Health Systems have held job fairs in response to the layoff. Our Business Specialists have been available to further assist with Rapid Response services at these events.

UC Merced has also connected with our office to provide open and available positions for clinical and non-clinical positions at their institution. All resources and re-employment opportunities have been shared with impacted employees through our text messaging platform. Additionally, follow up surveys have been sent to impacted employees and employers to capture re-employment data.

### **Financing:**

Workforce Innovation and Opportunity Act





### Agenda Item 8.3

☐ Consent

☐ Action

☒ Information

**To:** Workforce Development Board of Madera County  
**From:** Maiknue Vang, Executive Director  
**Date:** February 16, 2023  
**Subject:** CWA Article on English Language Services in Madera County

**Information:**

On behalf of the California Workforce Association, a non-profit member association that represents all 45 of the Workforce Development Boards in the State of California as well as over 70 affiliate members from Labor, Education, Industry, Chambers of Commerce, Government, and Community Based Organizations, N&R Publications highlighted our local Workforce Assistance Center in a story on how Workforce Development Boards help improve literacy. The article was released on February 8, 2023, and disseminated across the State to association members.

**Financing:**

Workforce Innovation and Opportunity Act

02/08/23

## **A warm handoff: how workforce development boards do more than just find someone a job**



People who are able to read English with proficiency can expect to nearly double their income.

BY: [RAUL CLEMENT](#) JANUARY 19, 2023  
(<https://calworkforce.org/cwa-news/3351/>)

### **Literacy and Employment**

When we talk about lowering unemployment, we're not just talking about creating more jobs. We're talking about a myriad of obstacles that need to be addressed.

One of the biggest of these is low literacy. According to a study by the Department of Education, 54% of adults in the U.S. lacked "literary proficiency." Of this 54%, over one-third were unemployed. And the rest saw steep drop-offs in earnings. An individual who tested at Level 1 on PIACC, an internationally validated literacy exam, earned on average \$34,000. Meanwhile, someone who tested at Level 3, the threshold for "proficiency," earned \$62,000, or nearly twice as much.

Employers need workers who can read and write well. It's that simple.

### **English-Language Fluency in Madera County**

Low literacy is not just the result of poor schooling. In communities with large immigrant populations, like Madera County, California, low literacy may stem directly from lack of fluency in English. Over 13% of Madera's immigrant population report speaking English "not well" or "not at all." Even if they may be well-educated in their native language, in the context of their new country they are illiterate.

The [Madera County Workforce Development Board](#) has come up with an innovative way to address this. Since 2016, their operations have been co-located with the [Madera Adult School](#) at a one-stop facility known as the Madera Workforce Assistance Center. While most workforce boards partner closely with local schools, their physical locations may be miles apart. In Madera County, this distance is mere feet.

Maiknue Vang, deputy director of the Madera County Workforce Investment Corporation, the nonprofit arm of the [Workforce Assistance Center](#), believes this proximity has paid huge dividends.



Maiknue Vang  
Madera County Workforce  
Investment Corporation

"Because we're co-located, we can walk a participant over versus doing an electronic referral and potentially losing that person as they leave our center."

This "warm handoff," as she refers to it, has increased enrollment in key programs offered by Madera Adult School. Among these programs are Adult Basic Education, English as a Second Language, and the High School Equivalency Test, also commonly referred to as

ABE, ESL and HiSET.

"Prior to 2016, we had minimal enrollments," Vang says. "We did referrals, but we were at separate locations. We had some enrollments in the HiSET classes, but we didn't have any enrollments in English as a Second Language or Adult Basic Education classes. Just the following year, once we were co-located, our numbers went from 74 to 112. We truly believe that's because there was more deliberate effort to be able to walk someone over and not lose that student."

### **A Two-Way Street**

Shirley Gregory, principal of Madera Adult School, has also seen the benefits of co-location. Not only is it easier for the Workforce Investment Corporation to refer students to Madera Adult School, but it's easier for Madera Adult School to help students access other services they may need. In addition to the Madera Adult School, there are several other partners co-located at the Workforce Assistance Center. These range from the Department of Social Services to the Department of Rehabilitation. Madera Adult School instructors work closely with students to make sure they understand their needs and challenges.



Shirley Gregory, Principal  
Madera Adult School

"When our teachers have a new student come into class, they are required to sit down with the student and try to learn as much as they can," Gregory says.

"Depending on what that student tells us, we may refer them to the workforce center for, say, bus tokens. If they need some type of financial help, the workforce center has other partners that they work with. Those partners can offer monetary aid or help with the PG&E bill this month."

This is especially helpful given Madera County's demographics.

"It's really been good because our community is a very low socioeconomic environment. It's really helpful when our students come in, or when their clients come in, that they don't have to travel all over Madera. They can get almost any type of need they have met here."

### **A Student's Perspective**

One student who has experienced firsthand the benefits of co-location is Sandra Cabrera. She is currently co-enrolled in ESL and HiSET classes, which she began in 2020 after realizing that as a non-English speaker, many career paths would be closed to her. It was also important for her to get a high school diploma. This is another way Madera County Workforce Development is unusual: local policy requires that individuals have a high school degree in order to be placed with an employer through Title 1 Workforce Innovation and Opportunity Act funded programs. Sandra has completed three out of five HiSET tests. She has studied everything from science to algebra to computer classes. She has even received information about job fairs, immigration and career options once she completes the HiSET.

"It's difficult, if not impossible, to learn about things like immigration if you don't speak the language," Cabrera says. "The Adult School has been very helpful for that."

When Sandra completes the program, she hopes to take the Child Development Course at [Madera Community College](#) and become a preschool teacher. “These classes help people like me advance ourselves in this country and contribute through our work.”

### **A Holistic Approach to Unemployment**

Treating unemployment in this country as a singular problem misses the bigger picture. Obstacles ranging from literacy to English-language fluency to poverty must be addressed simultaneously. The best way to do this is for workforce development boards, educators, social services and employers to work closely together. Madera County has found a forward-thinking way of expediting that: co-location.

“It’s been a great partnership with lots of benefits,” Gregory says. “There are probably some that I’m not even aware of. We get a bird’s-eye view of the opportunities and services in our community, and we’re able to relay that to our students.”

**For more information about the programs in Madera County, visit <https://www.maderaworkforce.org/>. To learn more about what workforce development boards are doing in Sacramento and across the state, see <https://calworkforce.org/>.**



## Agenda Item 8.4

☐ Consent

☐ Action

☒ Information

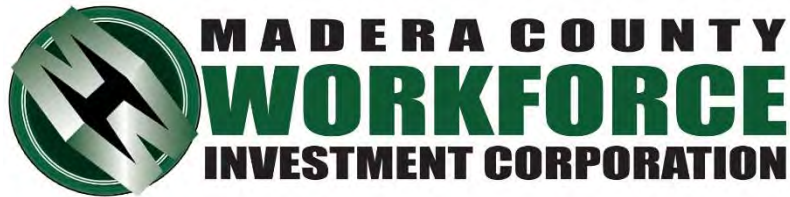
**To:** Workforce Development Board of Madera County  
**From:** Maiknue Vang, Executive Director  
**Date:** February 16, 2023  
**Subject:** Madera County Workforce Investment Corporation (MCWIC) Update

**Information:**

The MCWIC will meet next on February 23, 2023. The agenda for their latest meeting on January 26, 2023 as well as the minutes for the December 7, 2022, meeting are provided for the Board's review.

**Financing:**

Workforce Innovation and Opportunity Act



## **A G E N D A**

**January 26, 2023  
3:00 p.m.**

Meeting will be held at:

***Workforce Assistance Center – Executive Conference Room  
2037 W. Cleveland Avenue, Madera, CA 93637, 559-662-4589***

***REASONABLE ACCOMMODATION FOR ANY INDIVIDUAL WITH A DISABILITY*** Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in a meeting or function of the Madera County Workforce Investment Corporation, may request assistance by contacting the Executive Assistant at Madera County Workforce Investment Corporation office, 2037 W. Cleveland Avenue, Madera, CA 93637; Telephone 559/662-4589; CRS 711; Fax 559/673-1794.

This agenda and supporting documents relating to the items on this agenda are available through the Madera County Workforce Investment Corporation (MCWIC) website at <http://www.maderaworkforce.org/mcwic-meetings-and-agenda/>. These documents are also available at the Workforce Assistance Center – office of the Executive Director. MCWIC is an equal Opportunity Employer/Program. Auxiliary aids and services are available upon request.

### **1.0 Call to Order**

1.1 Pledge of Allegiance

### **2.0 Additions to the Agenda**

Items identified after preparation of the Agenda for which there is a need to take immediate action. Two-thirds vote required for consideration (Government Code Section 54954.2(b)(2))

### **3.0 Public Comment**

This time is made available for comment from the public on matters within the Board's jurisdiction. The comment period will be limited to 15 minutes. Each speaker will be limited to 3 minutes and only one speaker per subject matter.

### **4.0 Introductions and Recognitions**

### **5.0 Adoption of Board Agenda**

### **6.0 Consent Calendar**

6.1 Consideration of approval of the December 7, 2022, Madera County Workforce Investment Corporation (MCWIC) meeting minutes.

### **7.0 Closed Session**

7.1 Request for Closed Session: Public Employee Employment Pursuant to Government Code 54957 – Title of Position: MCWIC Executive Director.

### **8.0 Action Items**

8.1 Consideration of approval of the compensation package for the MCWIC Executive Director.

- 8.2 Consideration of approval of the MCWIC year-to-date financial reports for period ending October 31, 2022.
- 8.3 Consideration of approval of the MCWIC year-to-date financial reports for period ending November 30, 2022.

#### **9.0 Information Items**

- 9.1 Workforce Development Board (WDB) of Madera County Update
- 9.2 Madera Community Hospital (MCH) Closure and Rapid Response Update
- 9.3 Local and Regional Workforce Plan Modification Update
- 9.4 Information on Weekly Unemployment Insurance (UI) Initial Claims for Madera County

#### **10.0 Written Communication**

#### **11.0 Open Discussion/Reports/Information**

- 11.1 Board Members
- 11.2 Staff

#### **12.0 Next Meeting**

February 23, 2023

#### **13.0 Adjournment**





# **MADERA COUNTY WORKFORCE INVESTMENT CORPORATION**

## **SPECIAL MEETING**

## **MINUTES**

**December 7, 2022**

***Convened at the Workforce Assistance Center - Conference Room  
2037 W. Cleveland Avenue, Madera, CA 93637  
(559) 662-4589***

**PRESENT:** Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche

**ABSENT:** Roger Leach, Mattie Mendez

**GUEST:**

**STAFF:** Nicki Martin, Jessica Roche, Tracie Scott-Contreras, Maiknue Vang

### **1.0 Call to Order**

*Meeting called to order at 9:02 a.m. by Chair Debi Bray.*

#### **1.1 Pledge of Allegiance**

### **2.0 Additions to the Agenda**

*None.*

### **3.0 Public Comment**

*None.*

### **4.0 Introductions and Recognitions**

*Marisol Rivera was introduced to the Board. She was the successful candidate for the Program Supervisor position and is excited about her new role.*

### **5.0 Adoption of Board Agenda**

*Staff requested that action item 8.1 be considered before closed session.*

*Mike Farmer moved to adopt the agenda with the amendment, seconded by Gabriel Mejia.*

*Vote: Approved – unanimous*

*Yes: Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche*

### **6.0 Consent Calendar**

#### **6.1 Consideration of approval of the October 27, 2022, Madera County Workforce Investment Corporation (MCWIC) meeting minutes.**

*Tim Riche moved to approve, seconded by Gabriel Mejia.*

*Vote: Approved – unanimous*

Yes: Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche

## **7.0 Closed Session**

*Gabriel Mejia moved to close open session and go into closed session at 9:24 a.m., seconded by Ramona Davie.*

*Vote: Approved – unanimous*

Yes: Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche

### **7.1 Request for Closed Session: Public Employee Employment Pursuant to Government Code 54957 – Title of Position: Interim MCWIC Executive Director.**

*Gabriel Mejia moved to adjourn closed session at 10:09 a.m., seconded by Ramona Davie.*

*Vote: Approved – unanimous*

Yes: Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche

#### **a. Closed Session Report-out**

*MCWIC Chair Debi Bray stated that MCWIC has a succession plan in place is not naming an Interim Executive Director. The Deputy Director, Maiknue Vang, will be invited to provide a 10-minute presentation on her goals, objectives and what her plans would be if she stepped into the Executive Director position at the January, 2023, Board meeting. The Board will take the hiring process into consideration at the January 2023 Board meeting.*

## **8.0 Action Items**

### **8.1 Consideration of approval of the Audit Report for the 2021-2022 audited financial statements submitted by Moss Adams.**

*Doug Sampson presented the audited financial statements for the year ended June 30, 2022, to the Board. In addition, Moss Adams was engaged to conduct the audit under government auditing standards and uniform guidance standards. The Report of Independent Auditors provides information on what auditor responsibilities are and also provides the auditor opinion on the audited financial statements. MCWIC is receiving an unmodified/unqualified clean opinion over the financial statements that follow the report which include the Statement of Net Position, Statement of Activities, Functional Expenses and Cash Flows. The second page of the report speaks about supplementary information which include a Schedule of Expenditures of Federal Awards and Schedule of Grant Expenses. MCWIC also received an unmodified/unqualified clean opinion for these statements. The Statement of Financial Position shows net assets of almost \$600,000 as on June 30, 2022. The Statement of Activities categorizes the broad revenues, gains and supports of the organization. The Statement of Functional Expenses takes the classification of the expense categories and provides details for the categories. The Statement of Cash Flows is a reconciliation of the year's activities. The ending balance on this report matches the cash balance. The Notes to the Financial Statements was reviewed. There were no significant changes in the notes from the prior year. The Schedule of Expenditures of Federal Awards provides information on federal funds received by the MCWIC. Because MCWIC expends more than \$750,000 in federal awards, the audit must be conducted under government auditing standards and uniform guidance standards which requires auditors to check the organizations compliance with those standards. This schedule lists the Federal Assistance Listing Number, Pass-through Grantor's Identifying Number and Federal Expenditures for the period. This schedule also received an unmodified/unqualified opinion. The Schedule of Grant Expenses breaks out the expenses by categories. This statement received an unmodified/unqualified opinion. The Single Auditing Report has 2 sections – the Report on Internal Controls over Financial Reporting and the Compliance with Laws and Regulations. Moss Adams does not opine on MCWIC's internal controls over financial reporting or compliance of laws and regulations. Any findings over those sections would be mentioned in this report. The auditor did not come across any significant deficiencies or material weaknesses in MCWIC's internal controls over financial reporting. The Report of Independent Auditors on Compliance*

*for the Major Federal Program and Report on Internal control over Compliance Required by the Uniform Guidance is a mixed report. Moss Adams does opine on the compliance over the major federal program. MCWIC received an unmodified/unqualified opinion. The Schedule of Findings and Questioned Costs is a summary of the audit reports. The Board thanked Doug and Jessica for their work.*

*Tim Riche moved to accept the audited financial statements, seconded by Gabriel Mejia.*

*Vote: Approved – unanimous*

*Yes: Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche*

**8.2 Consideration of approval of the compensation package for the Interim MCWIC Executive Director.**

*No action was taken on agenda item 8.2.*

**8.3 Consideration of approval of the MCWIC year-to-date financial reports for period ending September 30, 2022.**

*The financial statements as of September 30, 2022, were presented and reviewed. Everything looks good. Allocations were received. The reports provided are based on unaudited financials. The budget adjustments presented on the reports do not include the adjustment request on the agenda. Due to participant paid work experience (PWEX) being done in-house, some line-item budget adjustments will need to be made. Previously, when the PWEX was contracted out, payroll would have been reflected in general ledger code 5800 but it will now be tracked internally and will show under the same line item as MCWIC employees. Information on participant PWEX wages can be found in the Note section of the Budget to Actual Report. The Employment Development Department (EDD) lease payments have been received.*

*Mike Farmer moved to approve the financial reports as presented, seconded by Ramona Davie.*

*Vote: Approved – unanimous*

*Yes: Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche*

**8.4 Consideration of approval of a budget adjustment in the amount of \$100,000 for the Pathways to Careers project funded by the Kaiser Foundation for term date 10/1/22 to 9/30/23.**

*MCWIC has received the grant funds from the Kaiser Foundation and is requesting approval of a budget amendment to include the funds in the budget. Staff are being assigned to the project. The grant funds are non-WIOA funds and can be used to provide services that WIOA would not cover.*

*Gabriel Mejia moved to approve, seconded by Mike Farmer.*

*Vote: Approved – unanimous*

*Yes: Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche*

**8.5 Consideration of approval of a budget adjustment in the amount of \$156,226 for the Quality Jobs, Equity, Strategy, and Training (QUEST) project funded by the National Dislocated Emergency Grant passed through the Employment Development Department (EDD) for term date 10/1/22 to 9/30/24 – \$117,575 to be applied to the current 2022-23 fiscal budget with remainder applied to the 2023-24 fiscal year budget.**

*Staff are requesting approval to amend the current 2022-23 budget in the amount of \$117,575 which starts as of October 1, 2022. Funds were received last week. The remaining balance will be applied to the 2023-24 budget.*

*Ramona Davie moved to approve, Seconded by Gabriel Mejia.*

*Vote: Approved – unanimous*

*Yes: Debi Bray, Ramona Davie, Mike Farmer, Gabriel Mejia, Tim Riche*

## **9.0 Information Items**

### **9.1 WIOA Formula Quarterly Budget and Program Overview as of September 2022**

*Information provided within the agenda packet. Everything is going well. Madera met their training requirement.*

### **9.2 Update on Sublessee changes to Workforce Assistance Center Sublease.**

*Information provided within the agenda packet.*

## **10.0 Written Communication**

*None.*

## **11.0 Open Discussion/Reports/Information**

### **11.1 Board Members**

- *Debi Bray thanked Tracie and Maiknue for the cookies and eggrolls.*
- *Mike Farmer announced the birth of his grandson.*

### **11.2 Staff**

- *Tracie stated that the Social Committee has started organizing events again. Everyone is excited.*
- *Maiknue state that there will be a small retirement reception for Tracie's retirement in February. She thanked the Board for their confidence in her.*

## **12.0 Next Meeting**

*January 26, 2023.*

## **13.0 Adjournment**

*Meeting adjourned at 10:43 a.m.*



## Agenda Item 8.5

☐ Consent

☐ Action

☒ Information

**To:** Workforce Development Board of Madera County  
**From:** Jessica Roche, Controller  
**Date:** February 16, 2023  
**Subject:** WIOA Formula and Special Projects Quarterly Program Overview

**Information:**

WIOA Formula and Special Projects Quarterly Program Overview report for period ending December 31, 2022. The report reflects data for the fiscal year 2022-2023.

**Financing:**

Workforce Innovation and Opportunity Act

**WIOA Formula and Special Projects Quarterly Program Overview as of December 2022**

Madera County Workforce Investment Corporation (MCWIC) is a nonprofit 501(c)(3) and is both the fiscal agent and the program operator for the Workforce Innovation and Opportunity Act (WIOA) in Madera County. MCWIC's primary annual source of income is the WIOA funds, but the organization also operates miscellaneous grants and awards that assist in achieving MCWIC's mission and goals, and are also used to leverage and complement the WIOA funding.

**WIOA Funding Requirements AB1149**

Senate Bill AB1149 requires that 20% of Adult and Dislocated Worker funding will support *direct training expenses* with a planned assumption of 10% leverage in order to meet the full requirement of 30%. Specific to YOA 2021 funds, MCWIC has met and exceeded the direct training requirement by 3.75% and exceeded the leverage resources by 7.58%.

| Summary of Leveraged Resources  |                             |               |                     |
|---|-----------------------------|---------------|---------------------|
|   |                             |               |                     |
| 1. LWIA Name  | MAD                         |               |                     |
| 2. Date   | 12/31/2022                  |               |                     |
| 3. Year of Appropriation  | 2021 AA211014 - Term 6/2023 |               |                     |
|   |                             |               |                     |
| Program Year Funding and Training Expenditures  |                             |               |                     |
|   |                             | % Achieved    | Amount              |
| 4. Adult and Dislocated Worker Formula Fund Allocations                                   |                             |               | \$ 1,347,221        |
| 5. Training Expenditure Requirement (direct & leveraged)                                  |                             |               | \$ 404,166          |
| 6. Formula Fund Training Expenditures (20% minimum per AB1149 = \$269,444)                |                             | 23.57%        | \$ 317,591          |
| 7a. Leveraged resources used for Training (10% = \$148,058)                               |                             | 17.58%        | \$ 201,847          |
| 7b. Leveraged resources used for Supportive Services                                      |                             |               | \$ 35,010           |
| 8. Total amount spent on Training and Supportive Services (should equal or exceed Line 5) |                             | 41.15%        | \$ 554,448          |
|   |                             |               |                     |
| Leveraged Resources Detail  |                             |               |                     |
| 8. Source (See page 2)  | Total Amount                | Training      | Supportive Services |
| A - Pell Grant  | \$ 23,170.00                | \$ 22,610.00  | \$ 560.00           |
| B - Programs authorized by the WIOA (not Formula)   | \$ 106,168.00               | \$ 102,163.00 | \$ 4,005.00         |
| C - TAA   | \$ -                        |               |                     |
| D - DOL NDWG  | \$ -                        |               |                     |
| E - Match from employers, industry, and industry associations                             | \$ 34,024.00                | \$ 34,024.00  |                     |
| F - Match funds from Joint labor Management trusts  | \$ -                        |               |                     |
| G - ETP grants  | \$ -                        |               |                     |
| H - SS for training WIOA Formula  | \$ 30,695.00                | \$ 650.00     | \$ 30,045.00        |
| I - TANF SS   | \$ -                        |               |                     |
| J - TANF TJT/WEX  | \$ -                        |               |                     |
| K - Other local,state,fed funds   | \$ 42,800.00                | \$ 42,400.00  | \$ 400.00           |
| I - CWDB approved funds   | \$ -                        |               |                     |
| Total   | \$ 236,857.00               | \$ 201,847.00 | \$ 35,010.00        |

**WIOA Funds Utilization**

WIOA Section 129 requires that a 75% of youth allocations are spent on Out-of-School Youth (OSY) and also that a minimum of 20% of youth allocation is spent on Youth Work Based Learning (WBL), also outlined on

EDD Workforce Services Directive (WSD) 17-07. MCWIC, under the direction of the Workforce Development Board of Madera County, focuses 100% of Youth allocation on OSY.

Funds utilization for Subgrant AA211014 staff feel confident that AA211014 funds will be fully expended as of June 30, 2023. However, due to the high carry-in of AA211014 funds into current year, subgrant AA311014 (current year subgrant) had a very late start in reporting expenditures. Staff are working on developing ways to increase client activity as well as obligating client funds into next fiscal year so they are not returned back to the State.

| MCWIC FUNDS UTILIZATION STATUS - AA211014 YOA 2021     |                  |   |  |   | as of   | 12/31/2022  |
|--|------------------|---|--|---|---|---|
| WIOA Formula Expenditures Status term 6/30/2023        |                  |   |  |   |   |   |
|  |                  | Allowable<br>"Program"<br>Funding 90% (less<br>10% admin) | Expenditures<br>Reported                                 | Obligations<br>Reported                           | Percentage<br>Expended to Date<br>(Exp+Obl)                           | Allocation Balance<br>Remaining until<br>6/30/2023                                  |
| Formula Fund   | Total Allocation |   |  |   |   |   |
| Adult  | \$ 1,119,203.00  | \$ 1,007,282.70   | \$ 1,082,700.29  | \$ -  | 97%   | \$ 36,502.71  |
| Youth  | \$ 773,210.00    | \$ 695,889.00   | \$ 522,131.16  | \$ 83,790.25                                      | 78%   | \$ 167,288.59   |
| Dislocated Worker                                      | \$ 228,018.00    | \$ 205,216.20   | \$ 195,937.38  | \$ 19,852.34                                      | 95%   | \$ 12,228.28  |
| 80% Obligation Requirement by 6/30/2022, waived by EDD |                  |   |  |   |   |   |
|  |                  | Allowable<br>"Program"<br>Funding 90% (less<br>10% admin) | 80% Required<br>Obligation<br>Amount by End<br>of 1st PY | Total Program<br>Obligations<br>Reported          | Percentage of<br>Total "Program"<br>Obligations to 80%<br>Requirement | Additional Obligations<br>Needed by June 30,<br>2022                                |
| Formula Fund   | Total Allocation |   |  |   |   |   |
| Adult  | \$ 1,119,203.00  | \$ 1,007,282.70   | \$ 805,826.16  | \$ 982,091.12                                     | 122%  | \$ (176,264.96)   |
| Youth  | \$ 773,210.00    | \$ 695,889.00   | \$ 556,711.20  | \$ 573,076.43                                     | 103%  | \$ (16,365.23)  |
| Dislocated Worker                                      | \$ 228,018.00    | \$ 205,216.20   | \$ 164,172.96  | \$ 192,987.92                                     | 118%  | \$ (28,814.96)  |
| OSY Youth Expenditure Status                           |                  |   |  |   |   |   |
|  |                  | Admin<br>Expenditures                                     | Program<br>Expenditures                                  | 75% OSY<br>Requirement on<br>"Program"<br>Funding | OSY Expenditures<br>Reported  | Additional<br>Expenditures Needed<br>to meet 75%<br>Requirement by end of<br>1st PY |
| Formula Fund   | Total Allocation |   |  |   |   |   |
| Youth  | \$ 773,210.00    | \$ 32,844.98  | \$ 489,286.18  | \$ 521,916.75                                     | \$ 489,286.18   | \$ 32,630.57  |
| OSY Work Experience Expenditure Status                 |                  |   |  |   |   |   |
|  |                  | Admin<br>Expenditures                                     | Program<br>Expenditures                                  | 20% WEX<br>Requirement on<br>"Program"<br>Funding | WEX Expenditures<br>Reported  | Additional<br>Expenditures Needed<br>to meet 20%<br>Requirement by End of<br>1st PY |
| Formula Fund   | Total Allocation |   |  |   |   |   |
| Youth  | \$ 773,210.00    | \$ 32,844.98  | \$ 489,286.18  | \$ 139,177.80                                     | \$ 352,027.45   | \$ (212,849.65)   |

**MCWIC FUNDS UTILIZATION STATUS - AA311014 YOA 2022**

as of

**12/31/2022****Funds Utilization Status - 80% Obligation Requirement by 6/30/2023, End of First Program Year**

| Formula Fund      | Total Allocation | Allowable "Program" Funding 90% (less 10% admin) | Expenditures Reported | Obligations Reported | Percentage Expended to Date (Exp+Obl) | Allocation Balance Remaining until 6/30/2023 |
|-------------------|------------------|--|-----------------------|----------------------|---------------------------------------|--|
| Adult             | \$ 827,911.00    | \$ 745,119.90                                    | \$ 13,478.12          | \$ 83,616.51         | 12%                                   | \$ 730,816.37                                |
| Youth             | \$ 836,147.00    | \$ 752,532.30                                    | \$ -                  | \$ -                 | 0%                                    | \$ 836,147.00                                |
| Dislocated Worker | \$ 603,688.00    | \$ 543,319.20                                    | \$ 14,608.71          | \$ -                 | 2%                                    | \$ 589,079.29                                |

**Funds Utilization Status - 80% Obligation Requirement by 6/30/2023, End of First Program Year**

| Formula Fund      | Total Allocation | Allowable "Program" Funding 90% (less 10% admin) | 80% Required Obligation Amount by End of 1st PY | Total Program Obligations Reported | Percentage of Total "Program" Obligations to 80% Requirement | Additional Obligations Needed by June 30, 2023 |
|-------------------|------------------|--|---|------------------------------------|--|--|
| Adult             | \$ 827,911.00    | \$ 745,119.90                                    | \$ 596,095.92                                   | \$ 83,616.51                       | 14%  | \$ 512,479.41                                  |
| Youth             | \$ 836,147.00    | \$ 752,532.30                                    | \$ 602,025.84                                   | \$ -                               | 0%   | \$ 602,025.84                                  |
| Dislocated Worker | \$ 603,688.00    | \$ 543,319.20                                    | \$ 434,655.36                                   | \$ -                               | 0%   | \$ 434,655.36                                  |

**OSY Youth Expenditure Status**

| Formula Fund | Total Allocation | Admin Expenditures | Program Expenditures | 75% OSY Requirement on "Program" Funding | OSY Expenditures Reported | Additional Expenditures Needed to meet 75% Requirement |
|--------------|------------------|--------------------|----------------------|--|---------------------------|--|
| Youth        | \$ 836,147.00    | \$ -               | \$ -                 | \$ 564,399.23                            | \$ -                      | \$ 564,399.23  |

**OSY Work Experience Expenditure Status**

| Formula Fund | Total Allocation | Admin Expenditures | Program Expenditures | 20% WEX Requirement on "Program" Funding | WEX Expenditures Reported | Additional Expenditures Needed to meet 20% Requirement by End of 1st PY |
|--------------|------------------|--------------------|----------------------|--|---------------------------|---|
| Youth        | \$ 836,147.00    | \$ -               | \$ -                 | \$ 150,506.46                            | \$ -                      | \$ 150,506.46   |

**MCWIC Program Update**

MCWIC has a combination of WIOA grants as well as State and Local contracts. Outside of the WIOA formula funding, these additional grants and contracts are competitively procured. The following is a chart of grants and contracts obtained during the fiscal year as well as the enrollment and activity by grant.

MCWIC was invited to apply for the AB628 Breaking Barriers to Employment Initiative with Root and Rebound as the project Lead. This proposal was awarded and MCWIC will receive approximately \$13,000 to partner with Root & Rebound (R&R) to connect formerly incarcerated women, an underserved and underrepresented population who traditionally have not accessed workforce services in Madera County, to the supports and resources they need to be successful. MCWIC will assign a single point of contact for R&R referrals to work with this population and provide career services, help them navigate the AJCC system, and assist with job placements and vocational training. In addition, MCWIC will provide office space to R&R staff who will also host Know Your Rights and Legal Clinics at the AJCC.



The Fresno Regional Workforce Development Board (FRWDB) is the lead for the Central California Forestry Corps (CCFC) groundbreaking initiative focused on strategies to build a skills workforce for the forestry sector. Madera will receive a sub award of \$52,500 to provide direct services, including eligibility, case management, management of supportive services, vocational training, paid work experience, job placement, follow-up and retention services to underserved and underrepresented populations to develop in-demand skills, earn industry certifications, secure entry-level forestry employment, and continue on a High Road path to quality careers in the forestry and wildland firefighting.

Madera is participating in the P2E 2.0 Regional Grant with San Joaquin County as the lead. The total grant funding is \$3,064,983.89. This grant is a continuation of the previous P2E grant that had been awarded. The funds will allow us to continue to serve the formerly incarcerated and other justice-involved individuals in the Central Valley by providing direct and indirect services. The actual county allocations are still pending.

Fresno EDC, in partnership with MCWIC and other key organizations, has been awarded \$23 million dollars through the U.S. Department of Commerce's Good Jobs Challenge where Madera will serve as the backbone for Transportation. Madera will receive approximately \$507,000 to fund a full time Program Navigator who will connect with workforce, education, and businesses to identify and build capacity in addressing gaps in skills, training, and employment.

Madera has partnered with the United Way of Fresno and Madera Counties for the CERF Economic Development Pilot funding, which will leverage and provide additional support to the Good Jobs Challenge through supportive services and stipends. These funds will provide access to entrepreneurship and increase social infrastructure in Madera County.

MCWIC's COVID Emergency Supplemental Funding contract with Madera County Probation ended on January 31, 2023. However, our work during this contract has resulted in conversations around a new contract to fund a full time MCWIC staff person to be stationed at the new Juvenile Justice Center effective July 1, 2023. The dedicated staff person will provide all AJCC services from intake and eligibility to job placement.

MCWIC is also in conversations with the Department of Forestry, Madera County Public Works, and Madera County to look at the damage caused by the severe weather storms and to determine a need to apply for the Severe Weather Store Disaster Recovery National Dislocated Worker Grant (SWS DR NDWG). The goal of the grant is to fund temporary disaster relief employment focused on cleaning up and repairing damage to public and eligible private lands caused by the storm and bringing them back to its normal state. We are waiting to hear back from the County and the Department of Forestry.

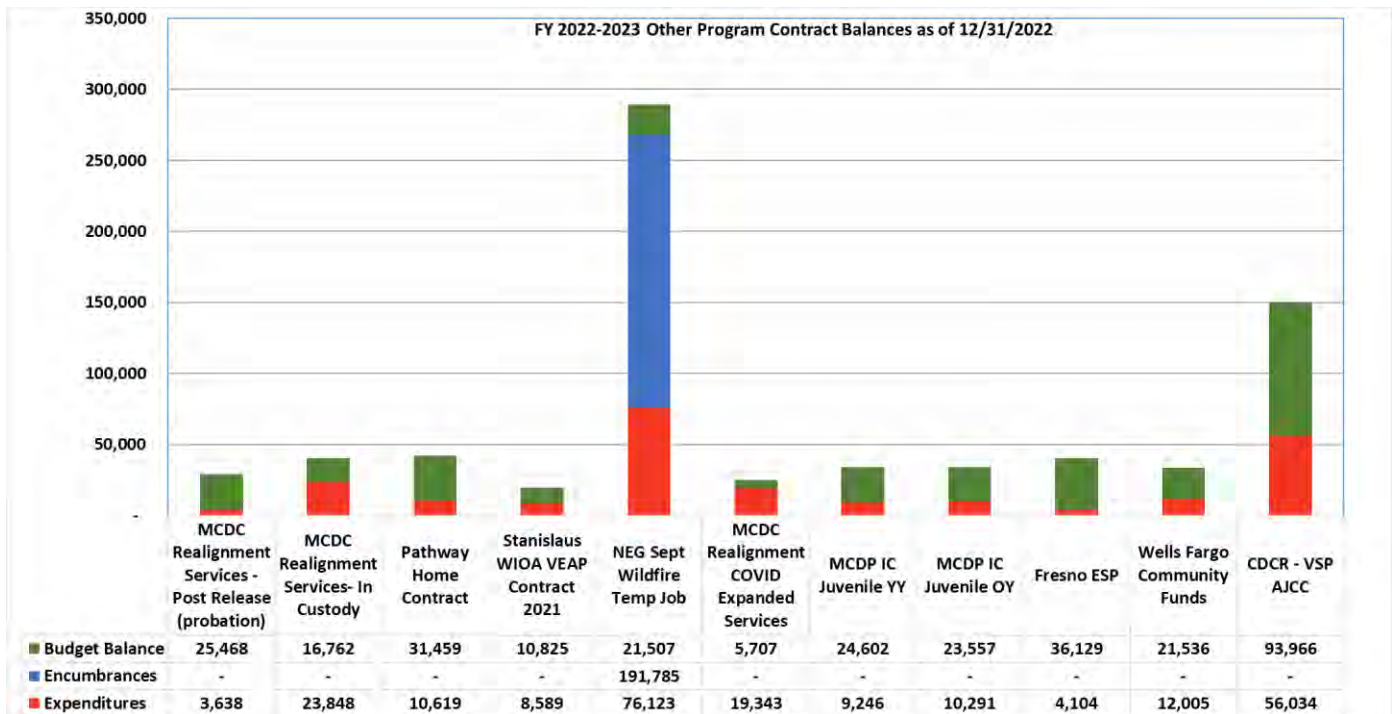
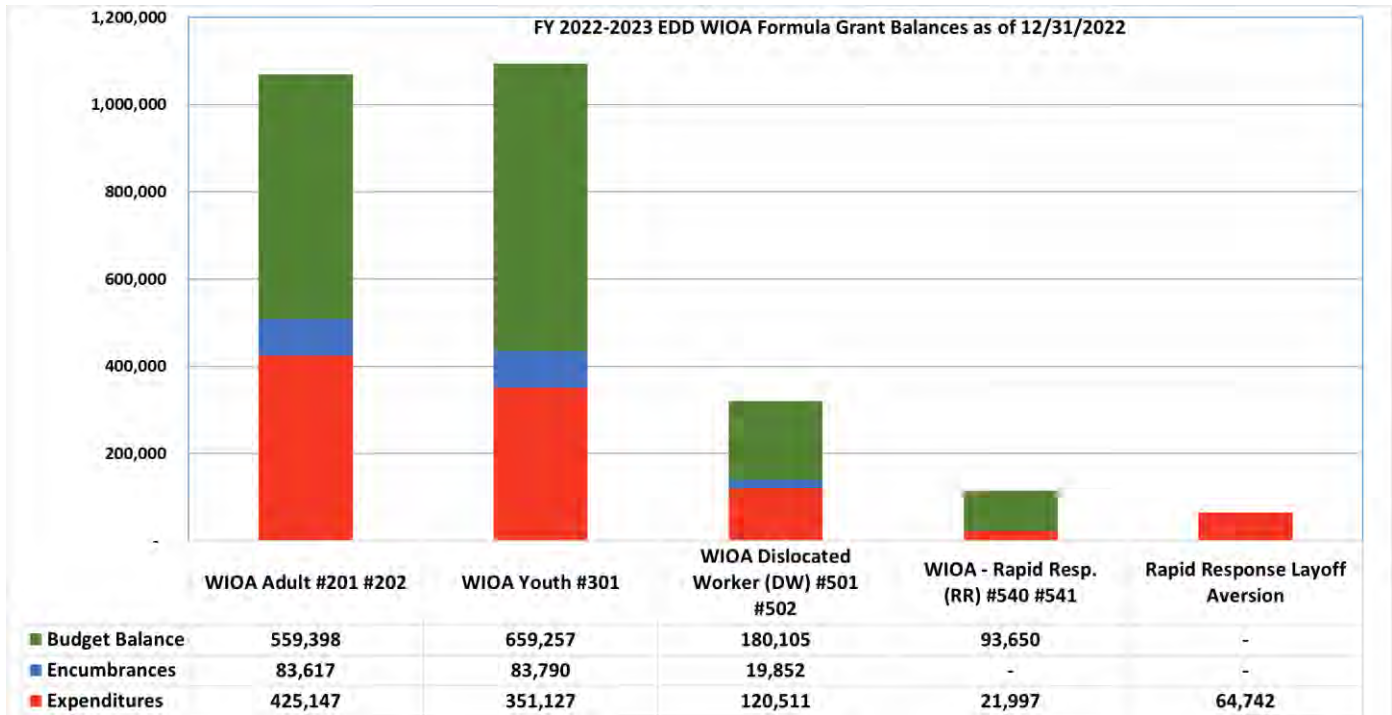
Lastly, we have received notification of a regional grant award – the Regional Equity and Recovery Partnership (RERP), which will expand our partnership with the Madera Community College in their Industrial Maintenance and Manufacturing/Welding pathways and include a vocational ESL (VESL) component. We are in the contracting and initial phase of implementation.

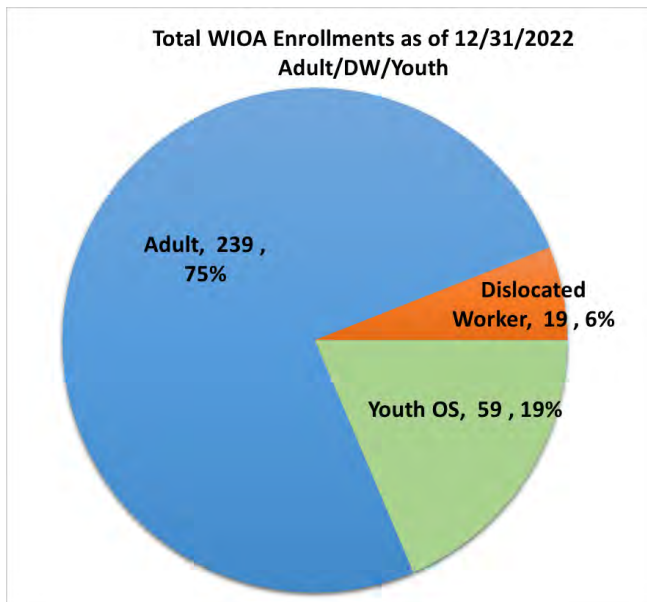
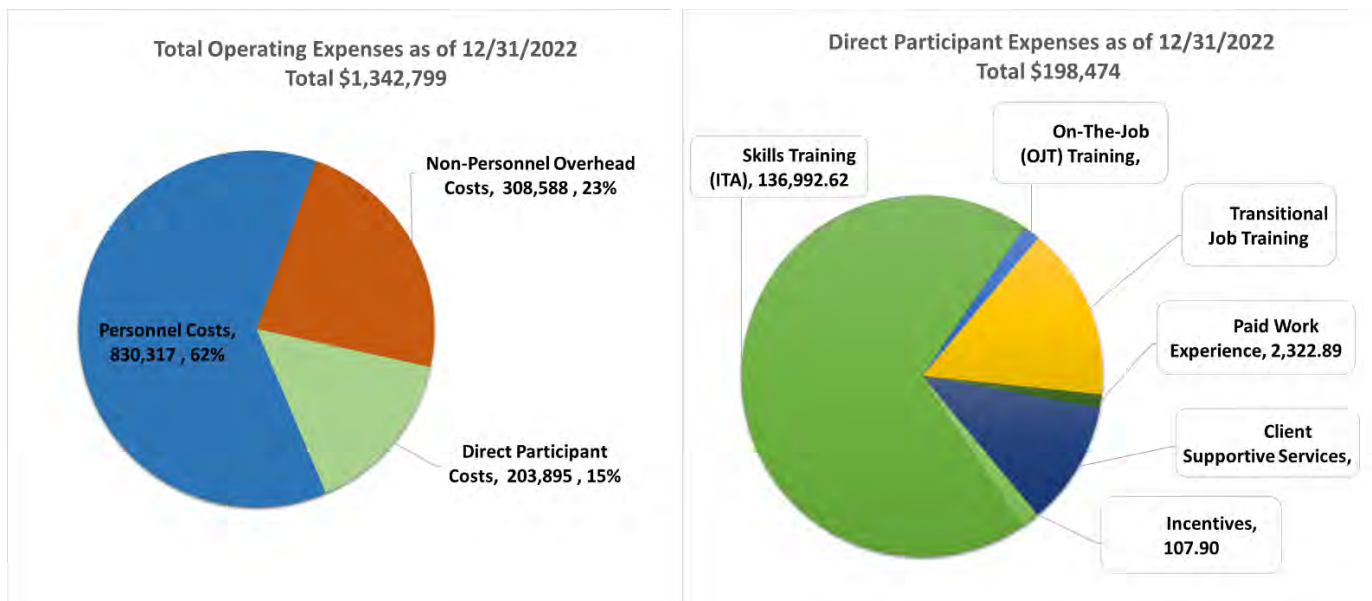
Allotment/Award amounts listed in the following charts are for the entire term of the contract. This amount may vary from the annual budget amount per FY if the term spans over the FY end period. Projects recently announced will be updated to charts once contracts are received.

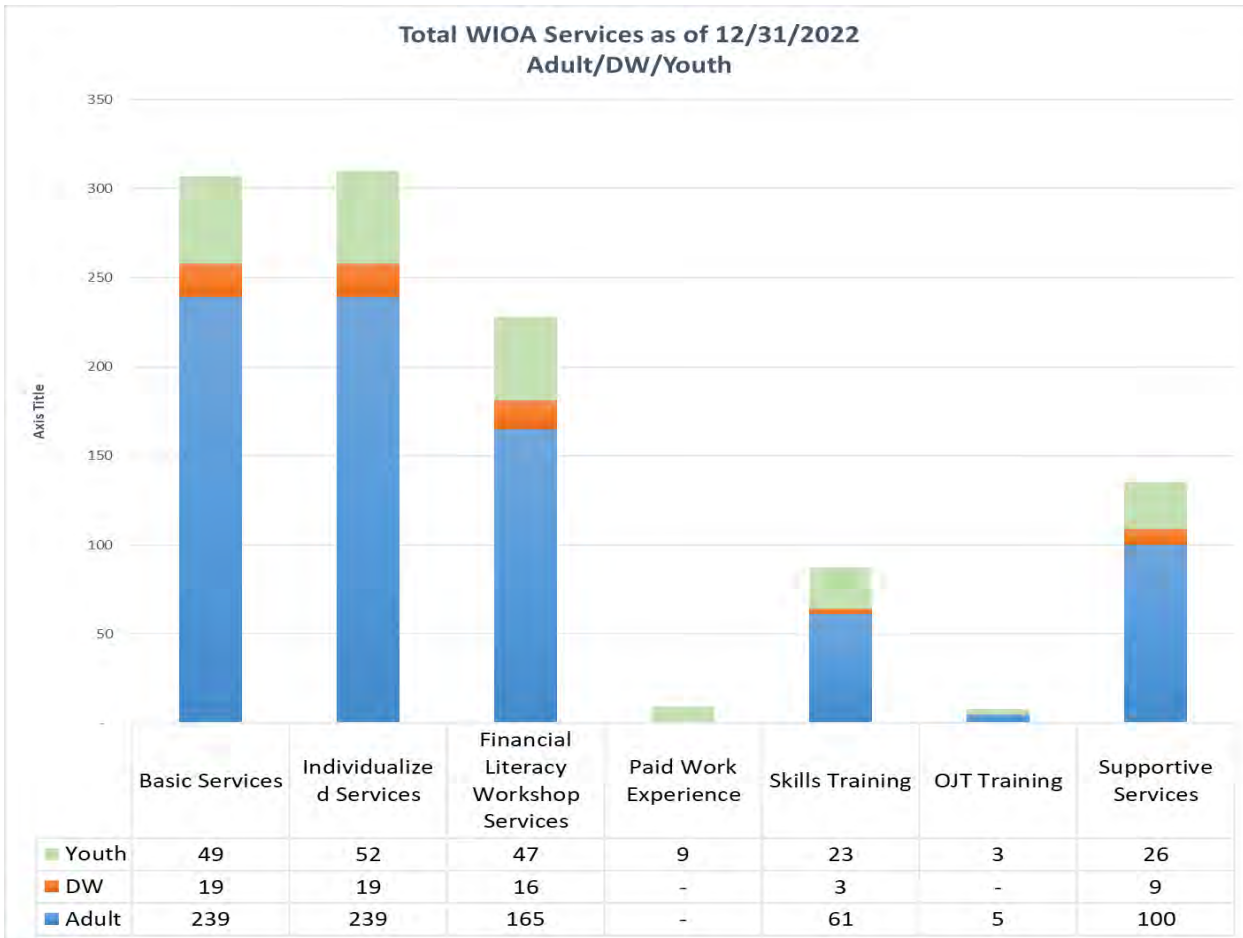
| <b><u>GRANTS and CONTRACT</u></b>   | <b><u>Allotment/Award<br/>Amount</u></b> | <b><u>Term</u></b>  | <b><u>Count Served as of 12.31.22</u></b>  |
|---|--|---------------------|--|
| <b>WIOA Formula Adult</b><br><br>SCOPE: Provide employment, training, and supportive services assistance for eligible adult participants.   | \$ 827,911.00                            | 7/1/2022-6/30/2023  | 239 Enrolled   |
| <b>WIOA Formula Dislocated Worker (DW)</b><br><br>SCOPE: Provide employment, training, and supportive service assistance for individuals who have been laid off due to a company downsizing or closure.   | \$ 603,688.00                            | 7/1/2022-6/30/2023  | 19 Enrolled  |
| <b>WIOA Formula Youth</b><br><br>SCOPE: Provide out-of-school youth between the ages of 18-24 with employment, training, and supportive service assistance.   | \$ 83,614.00                             | 4/1/2022-6/30/2023  | 59 Enrolled  |
| <b>WIOA Formula Rapid Response &amp; Layoff Aversion</b><br><br>SCOPE: Provide timely and effective response to potential layoffs and business closures (WARN notices) as well as enable affected workers to return to work as quickly as possible following a layoff. All funds have been expended.  | \$ 155,688.00                            | 7/1/2022-6/30/2023  | <ul style="list-style-type: none"> <li>• 2 WARN Notices</li> <li>• 8 RR Orientations</li> <li>• 6 In person hiring events</li> <li>• 28 recruitment flyers</li> <li>• 2 hiring videos</li> <li>• 6956 text messages</li> <li>• 4 OJTs</li> <li>• 0 TJT</li> <li>• 276 businesses served</li> </ul> |
| <b>GRID Pathway Home Project</b><br><br>SCOPE: In collaboration with GRID Alternatives and the Madera County Department of Corrections, identify in-custody individuals interested in solar careers. Provide transitional services, post-release orientation, career exploration, skills evaluation, and case management for individuals enrolled in GRID Alternatives Central Valley Solar Installer training program. | \$ 147,847.00                            | 7/1/2020-12/31/2023 | 63 Served/12 Enrolled  |
| <b>Stanislaus Veterans Employment Assistance Program (VEAP)</b><br><br>SCOPE: Funding to support staff person to conduct orientation and basic career services to connect Veterans to the AJCC. Funds have been fully expended.   | \$ 23,120.00                             | 7/1/2021-3/31/2023  | 10 Served/8 Enrolled   |

| <b><u>GRANTS and CONTRACT</u></b>   | <b><u>Allotment/Award<br/>Amount</u></b> | <b><u>Term</u></b>    | <b><u>Count Served as of 12.31.22</u></b> |
|---|--|-----------------------|---|
| <b>Wildfires National DW Grant (NDWG)</b><br><br>SCOPE: Funding to support temporary jobs working on recovery and cleanup efforts in the areas of Madera County impacted by the Creek Fire, including wages, other payroll costs, and worker's compensation coverage.   | \$ 300,000.00                            | 11/1/2020-12/31/2023  | 15 Enrolled                               |
| <b>Quality, Jobs Equity Training (QUEST) National DW Grant</b><br><br>SCOPE: Funding will be used to enable individuals adversely affected by the COVID-19 pandemic and the social and economic inequities that the pandemic exacerbated to enter, return to, or advance in high-quality jobs in growth industry sectors such as infrastructure, environment and climate, care economy, and other critical sectors with high-quality jobs.  | \$ 156,226.00                            | 10/1/2022-9/30/2024   | 0 Enrolled                                |
| <b>Fresno Equity and Special Populations (ESP) Contract</b><br><br>SCOPE: Madera County Workforce Investment Corporation (MCWIC) will collaborate with the Fresno Regional Workforce Development Board (FRWDB) to provide outreach and recruitment, orientation, eligibility, career aptitude/interest assessments, partner referrals, labor market information, supportive services, job ready/soft skills workshops, career counseling, referrals to vocational training, paid work experience, on-the- job training, job placement services, and follow-up services for the two targeted populations identified as ELL and Justice-Involved. | \$ 45,486.00                             | 2/1/2022-6/30/2023    | 6 Served/1 Enrolled                       |
| <b>Madera County AB109 CCP In-Custody</b><br><br>SCOPE: Provide a 4-week workshop for In-Custody Pre-Release customers at Department of Corrections and facilitate periodic job fairs inside the facility. Additionally, provide a 3-hour group Orientation and CalJOBS system registration workshop to post-release individuals four times a month at the Center as well as coordinate monthly resource fairs with Probation at the Center.  | \$ 56,627.00                             | 7/1/2022-6/30/2023    | 17 Served                                 |
| <b>Madera County AB109 CCP Probation</b><br><br>SCOPE: Provide a 4-week workshop for In-Custody Pre-Release customers at Department of Corrections and facilitate periodic job fairs inside the facility. Additionally, provide a 3-hour group Orientation and CalJOBS system registration workshop to post-release individuals four times a month at the Center as well as coordinate monthly resource fairs with Probation at the Center.   | \$ 34,762.00                             | 7/1/2022-6/30/2023    | 17 Served                                 |
| <b>Kaiser - Pathway to Careers</b><br><br>SCOPE: Funding to provide disconnected individuals who may not be eligible for WIOA Funds to access the broader workforce system through referrals, job readiness, vocational training, work experience, employment assistance and wrap around services. Targeted groups include individuals who are low income, have not registered for Selective Service, do not have a high school diploma/GED, are limited English proficient, and/or are undocumented. The grant will promote upward mobility, retention, and increase the self-worth of participants as they become contributing citizens.      | \$ 100,000.00                            | 10/14/2022-10/13/2023 | 4 Served                                  |

| <b><u>GRANTS and CONTRACT</u></b>  | <b><u>Allotment/Award<br/>Amount</u></b> | <b><u>Term</u></b> | <b><u>Count Served as of 12.31.22</u></b> |
|--|--|--------------------|---|
| <b>Madera County Juvenile<br/>Probation Realignment- Older<br/>Youth</b>   | \$ 35,646.00                             | 1/1/2022-6/30/2023 | 8 in Workshops                            |
| SCOPE: Provide a 10-week workshop for In-Custody Pre-Release Older Youth and 7-day workshop for In-Custody Pre-Release younger youth at the Juvenile Detention Facility Monday through Friday. The workshop is designed to serve Individuals who are within 90 to 120 days of release from the Juvenile facility but may also be offered to any individual that Juvenile Detention Staff deem is appropriate.      |  |                    |   |
| <b>Madera County Juvenile<br/>Probation Realignment-<br/>Younger Youth</b>   | \$ 35,646.00                             | 1/1/2022-6/30/2023 | 34 in Workshops                           |
| SCOPE: Provide a 10-week workshop for In-Custody Pre-Release Older Youth and 7-day workshop for In-Custody Pre-Release younger youth at the Juvenile Detention Facility Monday through Friday. The workshop is designed to serve Individuals who are within 90 to 120 days of release from the Juvenile facility but may also be offered to any individual that Juvenile Detention Staff deem is appropriate.      |  |                    |   |
| <b>Madera County COVID<br/>Emergency Supplemental<br/>Funding</b>  | \$ 33,843.00                             | 5/1/2022-1/31/2023 | Open                                      |
| SCOPE: Funding to support a part time staff person to conduct orientation and basic career services to participants at probation office locations throughout the county. Staff person will provide resources, referrals, and connect individuals to the AJCC. These funds have been fully expended and continuation of activities will be charged to the CCP Post Release grant.                                   |  |                    |   |
| <b>CDCR-VSP</b>  | \$ 150,000.00                            | 7/1/2022-6/30/2022 | 81 Orientation                            |
| SCOPE: Staff assist residents with employment readiness, skills development, job training, and employment services. Staff work with inmates nearing parole to provide connections to an AJCC program in their area of residence post-release, labor market data, referrals to appropriate community resources, and support the development of basic job search portfolio, based on needs and interests identified. |  |                    |   |
| <b>SS Ticket-toWork Contract</b>   | \$ 15,573.00                             | Open Ended         | 16 Tickets Assigned                       |
| SCOPE: Provide employment and training support to SSI/SSDI beneficiaries.  |  |                    |   |







The chart below displays the occupations for which clients have received services for this fiscal year. Services may include both supportive services as well as training services. All training determinations are based on an individual's service/employment plan as well as verifying current demand for the occupation resulting from the specific training. Services provided to individuals are to develop the right skills for today's labor market and to also provide a clear career path for those entering or re-entering the labor market.

All trainings noted below are only those started this fiscal year and do not include any carry-in from prior year. Also note the O'Net code 47-0000 includes the 15 enrolled Wildfire Grant temporary jobs.

| O'Net Occupation Activity   | Count     |
|---|-----------|
| 29-0000 Healthcare Practitioners and Technical Occupations        | 8         |
| 31-0000 Healthcare Support Occupations                            | 2         |
| 37-0000 Building and Grounds Cleaning and Maintenance Occupations | 3         |
| 43-0000 Office and Administrative Support Occupations             | 5         |
| 53-0000 Transportation and Material Moving Occupations            | 17        |
| Supportive Services Undetermined                                  | 1         |
| 47-0000 Construction and Extraction Occupations                   | 45        |
| 41-0000 Sales and Related Occupations                             | 3         |
| 33-0000 Protective Service Occupations                            | 2         |
| 21-0000 Community and Social Services Occupations                 | 1         |
| 51-0000 Production Occupations                                    | 1         |
| 35-0000 Food Preparation and Serving Related Occupations          | 3         |
| <b>Grand Total</b>  | <b>91</b> |



## Agenda Item 8.6

☐ Consent

☐ Action

☒ Information

**To: Workforce Development Board of Madera County**

**From: Maiknue Vang, Executive Director**

**Date: February 16, 2023**

**Subject: Unemployment Insurance (UI) Claim Information**

**Information:**

The most recent data on UI Claims for the period of December 10, 2022, through February 4, 2023 for Madera County is being provided for the WDB's review.

**Financing:**

Workforce Innovation and Opportunity Act



## California Unemployment Industry & Demographics Data Dashboard

(Dashboard appears better when viewed in full screen mode. Click the icon in the bottom right-hand corner of screen next to download icon.)

[About This Tool](#)
[County Claims](#)
[County Demographics](#)
[County Industry](#)
[Statewide Demographics](#)
[Statewide Industry](#)

### Weekly Initial Claims by County

| County | December<br>2022 |     |     |     | January<br>2023 |     |     |     | February<br>2023 |
|--------|------------------|-----|-----|-----|-----------------|-----|-----|-----|------------------|
|        | (Week Ending)    |     |     |     | (Week Ending)   |     |     |     | (Week<br>Ending) |
|        | 10               | 17  | 24  | 31  | 7               | 14  | 21  | 28  | 4                |
| Madera | 328              | 269 | 251 | 325 | 623             | 506 | 299 | 283 | 296              |

**Claim Type**
☒ UI Claims  
☐ PUA Claims

**County**

Madera

**Claims by Y...** Multipl...

**Claims by Week (Sele...**  
Multiple values

The data provided in these reports are the number of initial claim counts. It includes new claims, additional claims, and transitional claims. Data includes regular Unemployment Insurance program and federal extended benefit programs. Data for claimants who live outside of California, but collect benefits, and invalid addresses in California are not included in these numbers.

- A new claim is the first claim for a benefit year period (for the regular UI program it is 52 weeks). You can only have one new claim during a benefit year period.
- An additional claim is when a second claim is filed during the same benefit year and there is intervening work between the current claim and the previous claim. For example, an individual files a new claim, goes back to work, gets laid off and files another claim before the benefit year period of the first claim expires. An individual can have multiple additional claims during the same benefit year if individual you meet the eligibility requirements.
- A transitional claim is when a claimant is still collecting benefits at the end of their benefit year period and had sufficient wage earnings during that year to begin a new claim once the first benefit year period ends.



## Agenda Item 8.7

☐ Consent

☐ Action

☒ Information

**To:** Workforce Development Board of Madera County  
**From:** Maiknue Vang, Executive Director  
**Date:** February 16, 2023  
**Subject:** Form 700 Due April 1, 2023

**Information:**

The Form 700, Statement of Economic Interests is required by the Fair Political Practices Commission of any persons who sit on a Board that provides oversight to any agency receiving public funds and must be submitted annually by April 1 of each year. Staff are available to provide an orientation and information and assistance if there are any questions or concerns about the completion of this form. Further information as well as the Form itself can be found at <http://www.fppc.ca.gov/Form700.html>.

The Form 700 is also included in the agenda packet.

**Financing:**

Workforce Innovation and Opportunity Act

# 2022-2023 Statement of Economic Interests



## Form 700

A Public Document

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### ***Helpful Resources***

- Video Tutorials
- Reference Pamphlet
- Excel Version
- FAQs
- Gift and Travel Fact Sheet for State and Local Officials

## California Fair Political Practices Commission

1102 Q Street, Suite 3000 • Sacramento, CA 95811

Email Advice: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916) 322-5660 • Website: [www.fppc.ca.gov](http://www.fppc.ca.gov)

## Quick Start Guide

Detailed instructions begin on page 3.

### WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 1 – Most other filers

### WHERE DO I FILE?

Most people file the Form 700 with their agency. If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

### ITEMS TO NOTE!

- The Form 700 is a public document.
- Only filers serving in active military duty may receive an extension on the filing deadline.
- You must also report interests held by your spouse or registered domestic partner.
- Your agency's conflict of interest code will help you to complete the Form 700. You are encouraged to get your conflict of interest code from the person who asked you to complete the Form 700.

### NOTHING TO REPORT?

Mark the "No reportable interests" box on Part 4 of the Cover Page, and submit only the signed Cover Page. Please review each schedule carefully!

| Schedule                      | Common Reportable Interests   | Common Non-Reportable Interests  |
|-------------------------------|---|--|
| A-1: Investments              | Stocks, including those held in an IRA or 401K. Each stock must be listed.  | Insurance policies, government bonds, diversified mutual funds, funds similar to diversified mutual funds. |
| A-2: Business Entities/Trusts | Business entities, sole proprietorships, partnerships, LLCs, corporations and trusts. (e.g., Form 1099 filers).     | Savings and checking accounts, cryptocurrency, and annuities.  |
| B: Real Property              | Rental property in filer's jurisdiction, or within two miles of the boundaries of the jurisdiction.                 | A residence used exclusively as a personal residence (such as a home or vacation property).                |
| C: Income                     | Non-governmental salaries. Note that filers are required to report only half of their spouse's or partner's salary. | Governmental salary (from school district, for example).   |
| D: Gifts                      | Gifts from businesses, vendors, or other contractors (meals, tickets, etc.).  | Gifts from family members.   |
| E: Travel Payments            | Travel payments from third parties (not your employer).   | Travel paid by your government agency.   |

**Note:** Like reportable interests, non-reportable interests may also create conflicts of interest and could be grounds for disqualification from certain decisions.

### QUESTIONS?

- [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)
- (866) 275-3772 Mon-Thurs, 9-11:30 a.m.

### E-FILING ISSUES?

- If using your agency's system, please contact technical support at your agency.
- If using FPPC's e-filing system, write to [form700@fppc.ca.gov](mailto:form700@fppc.ca.gov).

## What's New

### Gift Limit Increase

The gift limit increased to **\$520** for calendar years **2021** and **2022**.

### Who must file:

- Elected and appointed officials and candidates listed in Government Code Section 87200
- Employees, appointed officials, and consultants filing pursuant to a conflict of interest code ("code filers"). **Obtain your disclosure categories, which describe the interests you must report, from your agency;** they are not part of the Form 700
- Candidates running for local elective offices that are designated in a conflict of interest code (e.g., county sheriffs, city clerks, school board trustees, and water board members)

#### Exception:

- Candidates for a county central committee are not required to file the Form 700
- Employees in newly created positions of existing agencies

For more information, see Reference Pamphlet, page 3, at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Where to file:

#### 87200 Filers

|                      |   |                             |
|----------------------|---|-----------------------------|
| State offices        | ⇒ | Your agency                 |
| Judicial offices     | ⇒ | The clerk of your court     |
| Retired Judges       | ⇒ | Directly with FPPC          |
| County offices       | ⇒ | Your county filing official |
| City offices         | ⇒ | Your city clerk             |
| Multi-County offices | ⇒ | Your agency                 |

#### Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest

**Code:** File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

**Members of Newly Created Boards and Commissions:** File with your agency or with your agency's code reviewing body pursuant to Regulation 18754.

**Employees in Newly Created Positions of Existing Agencies:** File with your agency or with your agency's code reviewing body. (See Reference Pamphlet, page 3.)

#### Candidates file as follow:

|  |   |  |
|--|---|--|
| State offices, Judicial offices and multi-county offices | ⇒ | County elections official with whom you file your declaration of candidacy |
| County offices   | ⇒ | County elections official  |
| City offices   | ⇒ | City Clerk   |
| Public Employee's Retirement System (CalPERS)            | ⇒ | CalPERS  |
| State Teacher's Retirement Board (CalSTRS)               | ⇒ | CalSTRS  |

### How to file:

The Form 700 is available at [www.fppc.ca.gov](http://www.fppc.ca.gov). Form 700 schedules are also available in Excel format. Each Statement must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. All statements are signed under the penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

### When to file:

#### Annual Statements

##### ⇒ March 1, 2023

- Elected State Officers
- Judges and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

##### ⇒ April 3, 2023

- Most other filers

Individuals filing under conflict of interest codes in city and county jurisdictions should verify the annual filing date with their filing official or filing officer.

Statements postmarked by the filing deadline are considered filed on time.

Statements of 30 pages or less may be emailed or faxed by the deadline as long as the originally signed paper version is sent by first class mail to the filing official within 24 hours.

#### Assuming Office and Leaving Office Statements

Most filers file within 30 days of assuming or leaving office or within 30 days of the effective date of a newly adopted or amended conflict of interest code.

#### Exception:

If you assumed office between October 1, 2022, and December 31, 2022, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2024, or April 1, 2024, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2023. (See Reference Pamphlet, page 6, for additional exceptions.)

#### Candidate Statements

File no later than the final filing date for the declaration of candidacy or nomination documents. A candidate statement is not required if you filed an assuming office or annual statement for the same jurisdiction within 60 days before filing a declaration of candidacy or other nomination documents.

#### Late Statements

**There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 19 for information on penalties and fines.)**

#### Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. The amended schedule(s) is attached to your original filed statement. Obtain amendment schedules at [www.fppc.ca.gov](http://www.fppc.ca.gov).

## Types of Statements

### Assuming Office Statement:

If you are a newly appointed official or are newly employed in a position designated, or that will be designated, in a state or local agency's conflict of interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in.

- Report: Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or position.

For positions subject to confirmation by the State Senate or the Commission on Judicial Appointments, your assuming office date is the date you were appointed or nominated to the position.

- Example: Maria Lopez was nominated by the Governor to serve on a state agency board that is subject to state Senate confirmation. The assuming office date is the date Maria's nomination is submitted to the Senate. Maria must report investments, interests in real property, and business positions Maria holds on that date, and income (including loans, gifts, and travel payments) received during the 12 months prior to that date.

If your office or position has been added to a newly adopted or newly amended conflict of interest code, use the effective date of the code or amendment, whichever is applicable.

- Report: Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment.

### Annual Statement:

Generally, the period covered is January 1, 2022, through December 31, 2022. If the period covered by the statement is different than January 1, 2022, through December 31, 2022, (for example, you assumed office between October 1, 2021, and December 31, 2021 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2022.

- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

### Leaving Office Statement:

Generally, the period covered is January 1, 2022, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2022, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2021, and December 31, 2021, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2022.

### Candidate Statement:

If you are filing a statement in connection with your candidacy for state or local office, investments, interests in real property, and business positions held on the date of filing your declaration of candidacy must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date of filing your declaration of candidacy is reportable. Do not change the preprinted dates on Schedules A-1, A-2, and B.

Candidates running for local elective offices (e.g., county sheriffs, city clerks, school board trustees, or water district board members) must file candidate statements, as required by the conflict of interest code for the elected position. The code may be obtained from the agency of the elected position.

### Amendments:

If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised; it is not necessary to refile the entire form. Obtain amendment schedules from the FPPC website at [www.fppc.ca.gov](http://www.fppc.ca.gov).

**Note:** Once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

### Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions on the Form 700 or on an attachment for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1.

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**STATEMENT OF ECONOMIC INTERESTS**  
**COVER PAGE**  
*A PUBLIC DOCUMENT*

Date Initial Filing Received  
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

**1. Office, Agency, or Court**

Agency Name *(Do not use acronyms)*

Division, Board, Department, District, if applicable

Your Position

► If filing for multiple positions, list below or on an attachment. *(Do not use acronyms)*

Agency: Position:

**2. Jurisdiction of Office** *(Check at least one box)*

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner  
*(Statewide Jurisdiction)*

☐ Multi-County

☐ County of

☐ City of

☐ Other

**3. Type of Statement** *(Check at least one box)*

☐ **Annual:** The period covered is January 1, 2022, through December 31, 2022.

☐ **Leaving Office:** Date Left / / *(Check one circle.)*

-or-

The period covered is / / , through December 31, 2022.

☐ The period covered is January 1, 2022, through the date of leaving office.

-or-

☐ **Assuming Office:** Date assumed / /

☐ The period covered is / / , through the date of leaving office.

☐ **Candidate:** Date of Election and office sought, if different than Part 1:

**4. Schedule Summary (required)**

► Total number of pages including this cover page:

**Schedules attached**

☐ Schedule A-1 - *Investments* - schedule attached

☐ Schedule C - *Income, Loans, & Business Positions* - schedule attached

☐ Schedule A-2 - *Investments* - schedule attached

☐ Schedule D - *Income - Gifts* - schedule attached

☐ Schedule B - *Real Property* - schedule attached

☐ Schedule E - *Income - Gifts - Travel Payments* - schedule attached

-or- ☐ **None** - No reportable interests on any schedule

**5. Verification**

MAILING ADDRESS STREET CITY STATE ZIP CODE  
*(Business or Agency Address Recommended - Public Document)*

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS  
( )

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed (month, day, year)

Signature *(File the originally signed paper statement with your filing official.)*

# Instructions

## Cover Page

Enter your name, mailing address, and daytime telephone number in the spaces provided. **Because the Form 700 is a public document, you may list your business/office address instead of your home address.**

### Part 1. Office, Agency, or Court

- Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm's name. (Examples: State Assembly; Board of Supervisors; Office of the Mayor; Department of Finance; Hope County Superior Court).
- Indicate the name of your division, board, or district, if applicable. (Examples: Division of Waste Management; Board of Accountancy; District 45). **Do not use acronyms.**
- Enter your position title. (Examples: Director; Chief Counsel; City Council Member; Staff Services Analyst).
- If you hold multiple positions (i.e., a city council member who also is a member of a county board or commission) you may be required to file separate and distinct statements with each agency. To simplify your filing obligations, in some cases you may instead complete a single expanded statement and file it with each agency.
  - The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1. To file an expanded statement for multiple positions, enter the name of each agency with which you are required to file and your position title with each agency in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement disclosing all reportable interests for all jurisdictions. Then file the expanded statement with each agency as directed by Regulation 18723.1(c).

If you assume or leave a position after a filing deadline, you must complete a separate statement. For example, a city council member who assumes a position with a county special district after the April annual filing deadline must file a separate assuming office statement. In subsequent years, the city council member may expand their annual filing to include both positions.

#### Example:

Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable interests for both offices and list both positions on the Cover Page. Brian will file the expanded statement with each the City and the District as directed by Regulation 18723.1(c).

### Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.

- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the “other” box and enter the county or city in which the agency has jurisdiction.

#### Example:

This filer is a member of a water district board with jurisdiction in portions of Yuba and Sutter Counties.

|   |   |
|---|---|
| <b>1. Office, Agency, or Court</b>  |   |
| Agency Name: (Do not use acronyms)<br>Feather River Irrigation District                   |   |
| Division, Board, Department, District, if applicable<br>N/A                               | Your Position<br>Board Member   |
| ► If filing for multiple positions, list below or on an attachment. (Do not use acronyms) |   |
| Agency: N/A   | Position:   |
| <b>2. Jurisdiction of Office</b> (Check at least one box)                                 |   |
| <input type="checkbox"/> State  | <input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction) |
| <input checked="" type="checkbox"/> Multi-County Yuba & Sutter Counties                   | <input type="checkbox"/> County of  |
| <input type="checkbox"/> City of  | <input type="checkbox"/> Other  |

### Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2022 annual statement, **do not** change the pre-printed dates to reflect 2023. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2023, through December 31, 2023, will be disclosed on your statement filed in 2024. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements for the same position may be combined. For example, if you leave office after January 1, but before the deadline for filing your annual statement, you may combine your annual and leaving office statements. File by the earliest deadline. Consult your filing officer or the FPPC.

### Part 4. Schedule Summary

- Complete the Schedule Summary after you have reviewed each schedule to determine if you have reportable interests.
- Enter the total number of completed pages including the cover page and either check the box for each schedule you use to disclose interests; **or** if you have nothing to disclose on any schedule, check the “No reportable interests” box. Please **do not** attach any blank schedules.

### Part 5. Verification

Complete the verification by signing the statement and entering the date signed. Each statement must have an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

**When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.



# SCHEDULE A-1

## Investments

### Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM **700**  
FAIR POLITICAL PRACTICES COMMISSION

Name

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other \_\_\_\_\_ (Describe)  
☐ Partnership ☐ Income Received of \$0 - \$499  
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22 \_\_\_\_/\_\_\_\_/22  
ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other \_\_\_\_\_ (Describe)  
☐ Partnership ☐ Income Received of \$0 - \$499  
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22 \_\_\_\_/\_\_\_\_/22  
ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other \_\_\_\_\_ (Describe)  
☐ Partnership ☐ Income Received of \$0 - \$499  
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22 \_\_\_\_/\_\_\_\_/22  
ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other \_\_\_\_\_ (Describe)  
☐ Partnership ☐ Income Received of \$0 - \$499  
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22 \_\_\_\_/\_\_\_\_/22  
ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other \_\_\_\_\_ (Describe)  
☐ Partnership ☐ Income Received of \$0 - \$499  
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22 \_\_\_\_/\_\_\_\_/22  
ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other \_\_\_\_\_ (Describe)  
☐ Partnership ☐ Income Received of \$0 - \$499  
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22 \_\_\_\_/\_\_\_\_/22  
ACQUIRED DISPOSED

Comments: \_\_\_\_\_

## Instructions – Schedules A-1 and A-2 Investments

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 13.)

### Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

### You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

### Reminders

- Do you know your agency’s jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

**Use Schedule A-1** to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. (See second example below.)

**Use Schedule A-2** to report ownership of 10% or greater (e.g., a sole proprietorship).

### To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

Frank Byrd holds a state agency position. Frank’s conflict of interest code requires full disclosure of investments. Frank must disclose stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by Frank’s spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. Alice has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

**SCHEDULE A-2**  
**Investments, Income, and Assets**  
**of Business Entities/Trusts**  
(Ownership Interest is 10% or Greater)

|                                     |
|-------------------------------------|
| <b>CALIFORNIA FORM 700</b>          |
| FAIR POLITICAL PRACTICES COMMISSION |
| Name _____                          |

|  |  |
|--|--|
| <b>1. BUSINESS ENTITY OR TRUST</b>   |  |
| Name _____   |  |
| Address (Business Address Acceptable) _____  |  |
| Check one<br><input type="checkbox"/> Trust, go to 2 <input type="checkbox"/> Business Entity, complete the box, then go to 2  |  |
| <b>GENERAL DESCRIPTION OF THIS BUSINESS</b>  |  |
| _____  |  |
| FAIR MARKET VALUE<br><input type="checkbox"/> \$0 - \$1,999<br><input type="checkbox"/> \$2,000 - \$10,000<br><input type="checkbox"/> \$10,001 - \$100,000<br><input type="checkbox"/> \$100,001 - \$1,000,000<br><input type="checkbox"/> Over \$1,000,000 | IF APPLICABLE, LIST DATE:<br>_____/_____/22      ____/_____/22<br>ACQUIRED      DISPOSED |
| NATURE OF INVESTMENT<br><input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> _____ Other   |  |
| YOUR BUSINESS POSITION _____   |  |

|   |  |
|---|--|
| <b>2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)</b>              |  |
| <input type="checkbox"/> \$0 - \$499<br><input type="checkbox"/> \$500 - \$1,000<br><input type="checkbox"/> \$1,001 - \$10,000 | <input type="checkbox"/> \$10,001 - \$100,000<br><input type="checkbox"/> OVER \$100,000 |

|  |  |
|--|--|
| <b>3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)</b> |  |
| <input type="checkbox"/> None    or <input type="checkbox"/> Names listed below  |  |

|  |  |
|--|--|
| <b>4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST</b>  |  |
| Check one box:<br><input type="checkbox"/> INVESTMENT <input type="checkbox"/> REAL PROPERTY   |  |
| Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property _____   |  |
| Description of Business Activity or City or Other Precise Location of Real Property _____  |  |
| FAIR MARKET VALUE<br><input type="checkbox"/> \$2,000 - \$10,000<br><input type="checkbox"/> \$10,001 - \$100,000<br><input type="checkbox"/> \$100,001 - \$1,000,000<br><input type="checkbox"/> Over \$1,000,000 | IF APPLICABLE, LIST DATE:<br>_____/_____/22      ____/_____/22<br>ACQUIRED      DISPOSED |
| NATURE OF INTEREST<br><input type="checkbox"/> Property Ownership/Deed of Trust <input type="checkbox"/> Stock <input type="checkbox"/> Partnership  |  |
| <input type="checkbox"/> Leasehold _____ Yrs. remaining <input type="checkbox"/> Other _____   |  |
| <input type="checkbox"/> Check box if additional schedules reporting investments or real property are attached   |  |

|  |  |
|--|--|
| <b>1. BUSINESS ENTITY OR TRUST</b>   |  |
| Name _____   |  |
| Address (Business Address Acceptable) _____  |  |
| Check one<br><input type="checkbox"/> Trust, go to 2 <input type="checkbox"/> Business Entity, complete the box, then go to 2  |  |
| <b>GENERAL DESCRIPTION OF THIS BUSINESS</b>  |  |
| _____  |  |
| FAIR MARKET VALUE<br><input type="checkbox"/> \$0 - \$1,999<br><input type="checkbox"/> \$2,000 - \$10,000<br><input type="checkbox"/> \$10,001 - \$100,000<br><input type="checkbox"/> \$100,001 - \$1,000,000<br><input type="checkbox"/> Over \$1,000,000 | IF APPLICABLE, LIST DATE:<br>_____/_____/22      ____/_____/22<br>ACQUIRED      DISPOSED |
| NATURE OF INVESTMENT<br><input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> _____ Other   |  |
| YOUR BUSINESS POSITION _____   |  |

|   |  |
|---|--|
| <b>2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)</b>              |  |
| <input type="checkbox"/> \$0 - \$499<br><input type="checkbox"/> \$500 - \$1,000<br><input type="checkbox"/> \$1,001 - \$10,000 | <input type="checkbox"/> \$10,001 - \$100,000<br><input type="checkbox"/> OVER \$100,000 |

|  |  |
|--|--|
| <b>3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)</b> |  |
| <input type="checkbox"/> None    or <input type="checkbox"/> Names listed below  |  |

|  |  |
|--|--|
| <b>4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST</b>  |  |
| Check one box:<br><input type="checkbox"/> INVESTMENT <input type="checkbox"/> REAL PROPERTY   |  |
| Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property _____   |  |
| Description of Business Activity or City or Other Precise Location of Real Property _____  |  |
| FAIR MARKET VALUE<br><input type="checkbox"/> \$2,000 - \$10,000<br><input type="checkbox"/> \$10,001 - \$100,000<br><input type="checkbox"/> \$100,001 - \$1,000,000<br><input type="checkbox"/> Over \$1,000,000 | IF APPLICABLE, LIST DATE:<br>_____/_____/22      ____/_____/22<br>ACQUIRED      DISPOSED |
| NATURE OF INTEREST<br><input type="checkbox"/> Property Ownership/Deed of Trust <input type="checkbox"/> Stock <input type="checkbox"/> Partnership  |  |
| <input type="checkbox"/> Leasehold _____ Yrs. remaining <input type="checkbox"/> Other _____   |  |
| <input type="checkbox"/> Check box if additional schedules reporting investments or real property are attached   |  |

Comments: \_\_\_\_\_

## Instructions – Schedule A-2

### Investments, Income, and Assets of Business Entities/Trusts

---

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

#### To Complete Schedule A-2:

**Part 1.** Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check "Business Entity" and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

**Part 2.** Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

**Part 3.** Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.)

**Part 4.** Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.

- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.



## Instructions – Schedule B

### Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 13.)

#### Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

#### You are not required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

#### To Complete Schedule B:

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold,

#### Reminders

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

disclose the number of years remaining on the lease.

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender's business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

#### Example:

Allison Gande is a city planning commissioner. During the reporting period, Allison received rental income of \$12,000, from a single tenant who rented property owned in the city's jurisdiction. If Allison received \$6,000 each from two tenants, the tenants' names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

|   |   |
|---|---|
| ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS<br>4600 24th Street  |   |
| CITY<br>Sacramento  |   |
| FAIR MARKET VALUE<br><input type="checkbox"/> \$2,000 - \$10,000<br><input type="checkbox"/> \$10,001 - \$100,000<br><input checked="" type="checkbox"/> \$100,001 - \$1,000,000<br><input type="checkbox"/> Over \$1,000,000   | IF APPLICABLE, LIST DATE:<br>ACQUIRED / / XX / XX<br>DISPOSED / / XX / XX |
| NATURE OF INTEREST<br><input type="checkbox"/> Ownership/Deed of Trust<br><input type="checkbox"/> Leasehold<br><input type="checkbox"/> Easement<br><input type="checkbox"/> Other   |   |
| IF RENTAL PROPERTY, GROSS INCOME RECEIVED<br><input type="checkbox"/> \$0 - \$499<br><input type="checkbox"/> \$500 - \$1,000<br><input type="checkbox"/> \$1,001 - \$10,000<br><input checked="" type="checkbox"/> \$10,001 - \$100,000<br><input type="checkbox"/> OVER \$100,000 |   |
| SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.<br><input type="checkbox"/> None<br>Henry Wells   |   |
| NAME OF LENDER*<br>Sophia Petroloilo  |   |
| ADDRESS (Business Address Acceptable)<br>2121 Blue Sky Parkway, Sacramento  |   |
| BUSINESS ACTIVITY, IF ANY, OF LENDER<br>Restaurant Owner  |   |
| INTEREST RATE<br>8 % <input type="checkbox"/> None  | TERM (Months/Years)<br>15 Years   |
| HIGHEST BALANCE DURING REPORTING PERIOD<br><input type="checkbox"/> \$500 - \$1,000<br><input type="checkbox"/> \$1,001 - \$10,000<br><input checked="" type="checkbox"/> \$10,001 - \$100,000<br><input type="checkbox"/> OVER \$100,000   |   |
| <input type="checkbox"/> Guarantor, if applicable   |   |
| Comments:   |   |



**SCHEDULE C**  
**Income, Loans, & Business**  
**Positions**  
(Other than Gifts and Travel Payments)

|                                     |
|-------------------------------------|
| <b>CALIFORNIA FORM 700</b>          |
| FAIR POLITICAL PRACTICES COMMISSION |
| Name<br><br>                        |

| ▶ 1. INCOME RECEIVED   | ▶ 1. INCOME RECEIVED   |
|--|--|
| NAME OF SOURCE OF INCOME<br><br>   | NAME OF SOURCE OF INCOME<br><br>   |
| ADDRESS (Business Address Acceptable)<br><br>  | ADDRESS (Business Address Acceptable)<br><br>  |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE<br><br>   | BUSINESS ACTIVITY, IF ANY, OF SOURCE<br><br>   |
| YOUR BUSINESS POSITION<br><br>   | YOUR BUSINESS POSITION<br><br>   |
| GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only  | GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only  |
| <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000   | <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000   |
| <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000  | <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000  |
| CONSIDERATION FOR WHICH INCOME WAS RECEIVED  | CONSIDERATION FOR WHICH INCOME WAS RECEIVED  |
| <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income<br>(For self-employed use Schedule A-2.) | <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income<br>(For self-employed use Schedule A-2.) |
| <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use<br>Schedule A-2.)  | <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use<br>Schedule A-2.)  |
| <input type="checkbox"/> Sale of _____<br>(Real property, car, boat, etc.)   | <input type="checkbox"/> Sale of _____<br>(Real property, car, boat, etc.)   |
| <input type="checkbox"/> Loan repayment  | <input type="checkbox"/> Loan repayment  |
| <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more<br><br>(Describe)              | <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more<br><br>(Describe)              |
| <input type="checkbox"/> Other _____<br>(Describe)   | <input type="checkbox"/> Other _____<br>(Describe)   |

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

|   |   |
|---|---|
| NAME OF LENDER*<br><br>                       | INTEREST RATE<br><br>_____ % <input type="checkbox"/> None                |
| ADDRESS (Business Address Acceptable)<br><br> | TERM (Months/Years)<br><br>_____  |
| BUSINESS ACTIVITY, IF ANY, OF LENDER<br><br>  | SECURITY FOR LOAN   |
| HIGHEST BALANCE DURING REPORTING PERIOD       | <input type="checkbox"/> None <input type="checkbox"/> Personal residence |
| <input type="checkbox"/> \$500 - \$1,000      | <input type="checkbox"/> Real Property _____<br>Street address            |
| <input type="checkbox"/> \$1,001 - \$10,000   | _____ City  |
| <input type="checkbox"/> \$10,001 - \$100,000 | <input type="checkbox"/> Guarantor _____                                  |
| <input type="checkbox"/> OVER \$100,000       | <input type="checkbox"/> Other _____<br>(Describe)                        |

Comments: \_\_\_\_\_

# Instructions – Schedule C

## Income, Loans, & Business Positions

### (Income Other Than Gifts and Travel Payments)

#### Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 11.) You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

#### Reporting Business Positions:

You must report your job title with each reportable business entity even if you received no income during the reporting period. Use the comments section to indicate that no income was received.

#### Commonly reportable income and loans include:

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10.)
- Incentive compensation (See Reference Pamphlet, page 12.)

#### Reminders

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

#### You are not required to report:

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

(See Reference Pamphlet, page 12.)

#### To Complete Schedule C:

##### Part 1. Income Received/Business Position Disclosure

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. (See Reference Pamphlet, page 8.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

##### Part 2. Loans Received or Outstanding During the Reporting Period

- Provide the name and address of the lender.
- Provide a general description of the business activity if the lender is a business entity.
- Check the box indicating the highest balance of the loan during the reporting period.
- Disclose the interest rate and the term of the loan.
  - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period.
  - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
- Identify the security, if any, for the loan.



SCHEDULE D

Income – Gifts

| <div> <div>▶ NAME OF SOURCE (Not an Acronym)</div> <div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> </div> </div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> </table> | DATE (mm/dd/yy) | VALUE                  | DESCRIPTION OF GIFT(S) | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | <div> <div>▶ NAME OF SOURCE (Not an Acronym)</div> <div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> </div> </div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> </table> | DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ |
|---|-----------------|------------------------|------------------------|----------------|----------|-------|----------------|----------|-------|----------------|----------|-------|---|-----------------|-------|------------------------|----------------|----------|-------|----------------|----------|-------|----------------|----------|-------|
| DATE (mm/dd/yy)   | VALUE           | DESCRIPTION OF GIFT(S) |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| DATE (mm/dd/yy)   | VALUE           | DESCRIPTION OF GIFT(S) |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| <div> <div>▶ NAME OF SOURCE (Not an Acronym)</div> <div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> </div> </div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> </table> | DATE (mm/dd/yy) | VALUE                  | DESCRIPTION OF GIFT(S) | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | <div> <div>▶ NAME OF SOURCE (Not an Acronym)</div> <div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> </div> </div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> </table> | DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ |
| DATE (mm/dd/yy)   | VALUE           | DESCRIPTION OF GIFT(S) |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| DATE (mm/dd/yy)   | VALUE           | DESCRIPTION OF GIFT(S) |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| <div> <div>▶ NAME OF SOURCE (Not an Acronym)</div> <div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> </div> </div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> </table> | DATE (mm/dd/yy) | VALUE                  | DESCRIPTION OF GIFT(S) | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | <div> <div>▶ NAME OF SOURCE (Not an Acronym)</div> <div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> </div> </div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>____/____/____</td> <td>\$ _____</td> <td>_____</td> </tr> </table> | DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ | ____/____/____ | \$ _____ | _____ |
| DATE (mm/dd/yy)   | VALUE           | DESCRIPTION OF GIFT(S) |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| DATE (mm/dd/yy)   | VALUE           | DESCRIPTION OF GIFT(S) |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |
| ____/____/____  | \$ _____        | _____                  |                        |                |          |       |                |          |       |                |          |       |   |                 |       |                        |                |          |       |                |          |       |                |          |       |

Comments:

## Instructions – Schedule D

### Income – Gifts

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is unknown, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary. You may indicate an intermediary either in the "source" field after the name or in the "comments" section at the bottom of Schedule D.

#### Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

#### Reminders

- Gifts from a single source are subject to a \$520 limit in 2022. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

#### Gift Tracking Mobile Application

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

#### You are not required to disclose:

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (See Regulation 18942 for a complete list.). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist registered to lobby your state agency, on holidays, birthdays, or similar occasions
- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars)
- A monetary bequest or inheritance (However, inherited investments or real property may be reportable on other schedules.)
- Personalized plaques or trophies with an individual value of less than \$250
- Campaign contributions
- Up to two tickets, for your own use, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket must be received from the organization or committee holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established relationship with the family member and there is no evidence to suggest the donor had a purpose to influence you. (See Regulation 18943.)
- Free admission, food, and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not a lobbyist registered to lobby the official's state agency, where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.

#### To Complete Schedule D:

- Disclose the full name (not an acronym), address, and, if a business entity, the business activity of the source.
- Provide the date (month, day, and year) of receipt, and disclose the fair market value and description of the gift.

**SCHEDULE E**  
**Income – Gifts**  
**Travel Payments, Advances,**  
**and Reimbursements**

|   |
|---|
| <b>CALIFORNIA FORM 700</b><br>FAIR POLITICAL PRACTICES COMMISSION |
| Name _____  |

- Mark either the gift or income box.
- Mark the “501(c)(3)” box for a travel payment received from a nonprofit 501(c)(3) organization or the “Speech” box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

|   |
|---|
| ▶ NAME OF SOURCE <i>(Not an Acronym)</i>  |
| ADDRESS <i>(Business Address Acceptable)</i>  |
| CITY AND STATE  |
| <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE        |
| DATE(S): ____/____/____ - ____/____/____ AMT: \$_____<br><i>(If gift)</i>                   |
| ▶ MUST CHECK ONE: <input type="checkbox"/> Gift <b>-or-</b> <input type="checkbox"/> Income |
| <input type="checkbox"/> Made a Speech/Participated in a Panel                              |
| <input type="checkbox"/> Other - Provide Description _____                                  |
| ▶ If Gift, Provide Travel Destination _____   |

|   |
|---|
| ▶ NAME OF SOURCE <i>(Not an Acronym)</i>  |
| ADDRESS <i>(Business Address Acceptable)</i>  |
| CITY AND STATE  |
| <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE        |
| DATE(S): ____/____/____ - ____/____/____ AMT: \$_____<br><i>(If gift)</i>                   |
| ▶ MUST CHECK ONE: <input type="checkbox"/> Gift <b>-or-</b> <input type="checkbox"/> Income |
| <input type="checkbox"/> Made a Speech/Participated in a Panel                              |
| <input type="checkbox"/> Other - Provide Description _____                                  |
| ▶ If Gift, Provide Travel Destination _____   |

|   |
|---|
| ▶ NAME OF SOURCE <i>(Not an Acronym)</i>  |
| ADDRESS <i>(Business Address Acceptable)</i>  |
| CITY AND STATE  |
| <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE        |
| DATE(S): ____/____/____ - ____/____/____ AMT: \$_____<br><i>(If gift)</i>                   |
| ▶ MUST CHECK ONE: <input type="checkbox"/> Gift <b>-or-</b> <input type="checkbox"/> Income |
| <input type="checkbox"/> Made a Speech/Participated in a Panel                              |
| <input type="checkbox"/> Other - Provide Description _____                                  |
| ▶ If Gift, Provide Travel Destination _____   |

|   |
|---|
| ▶ NAME OF SOURCE <i>(Not an Acronym)</i>  |
| ADDRESS <i>(Business Address Acceptable)</i>  |
| CITY AND STATE  |
| <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE        |
| DATE(S): ____/____/____ - ____/____/____ AMT: \$_____<br><i>(If gift)</i>                   |
| ▶ MUST CHECK ONE: <input type="checkbox"/> Gift <b>-or-</b> <input type="checkbox"/> Income |
| <input type="checkbox"/> Made a Speech/Participated in a Panel                              |
| <input type="checkbox"/> Other - Provide Description _____                                  |
| ▶ If Gift, Provide Travel Destination _____   |

Comments: \_\_\_\_\_

\_\_\_\_\_

# Instructions – Schedule E

## Travel Payments, Advances, and Reimbursements

Travel payments reportable on Schedule E include advances and reimbursements for travel and related expenses, including lodging and meals.

Gifts of travel may be subject to the gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. (See the FPPC fact sheet entitled "Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans" to read about travel payments under section 89506(a).)

### You are not required to disclose:

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a nonprofit entity exempt from taxation under Internal Revenue Code Section 501(c)(3) for which you provided equal or greater consideration, such as reimbursement for travel on business for a 501(c)(3) organization for which you are a board member.

**Note: Certain travel payments may not be reportable if reported via email on Form 801 by your agency.**

### To Complete Schedule E:

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
  - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$500 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- **Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

### Example:

City council member MaryClaire Chandler is the chair of a 501(c)(6) trade association, and the association pays for MaryClaire's travel to attend its meetings. Because MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which they are not providing services are likely considered gifts.

Note that the same payment from a 501(c)(3) would NOT be reportable.

### Example:

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose.

Thus, Mayor Kim must report the gift of travel, but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at [www.fppc.ca.gov](http://www.fppc.ca.gov).)

|  |                |
|--|----------------|
| ▶ NAME OF SOURCE (Not an Acronym)  |                |
| Health Services Trade Association  |                |
| ADDRESS (Business Address Acceptable)  |                |
| 1230 K Street, Suite 610   |                |
| CITY AND STATE   |                |
| Sacramento, CA   |                |
| <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE                 |                |
| Association of Healthcare Workers  |                |
| DATE(S):   | AMT: \$ 550.00 |
| (If gift)  |                |
| ▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input checked="" type="checkbox"/> Income      |                |
| <input type="radio"/> Made a Speech/Participated in a Panel  |                |
| <input checked="" type="radio"/> Other - Provide Description Travel reimbursement for board meeting. |                |
| ▶ If Gift, Provide Travel Destination  |                |

|  |                  |
|--|------------------|
| ▶ NAME OF SOURCE (Not an Acronym)  |                  |
| Chengdu Municipal People's Government  |                  |
| ADDRESS (Business Address Acceptable)  |                  |
| 2 Caoshi St. CaoShiJie, Qingyang Qu, Chengdu Shi,  |                  |
| CITY AND STATE   |                  |
| Sichuan Sheng, China, 610000   |                  |
| <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE                 |                  |
| DATE(S):   | AMT: \$ 3,874.38 |
| (If gift)  |                  |
| ▶ MUST CHECK ONE: <input checked="" type="checkbox"/> Gift -or- <input type="checkbox"/> Income      |                  |
| <input type="radio"/> Made a Speech/Participated in a Panel  |                  |
| <input checked="" type="radio"/> Other - Provide Description Travel reimbursement for trip to China. |                  |
| ▶ If Gift, Provide Travel Destination  |                  |
| Sichuan Sheng, China   |                  |

## Restrictions and Prohibitions

The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees to publicly disclose their economic interests including personal assets and income. The Act's conflict of interest provisions also disqualify a public official from taking part in a governmental decision if it is reasonably foreseeable that the decision will have a material financial effect on these economic interests as well as the official's personal finances and those of immediate family. (Gov. Code Sections 87100 and 87103.) The Fair Political Practices Commission (FPPC) is the state agency responsible for issuing the attached Statement of Economic Interests, Form 700, and for interpreting the Act's provisions.

### Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2021-2022, the gift limit increased to \$520 from a single source during a calendar year.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 10.

State and local officials and employees should check with their agency to determine if other restrictions apply.

### Disqualification

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions that will affect their economic interests. This may include interests they are not required to disclose. For example, a personal residence is often not reportable, but may be grounds for disqualification. Specific disqualification requirements apply to 87200 filers (e.g., city councilmembers, members of boards of supervisors, planning commissioners, etc.). These officials must publicly identify the economic interest that creates a conflict of interest and leave the room before a discussion or vote takes place at a public meeting. For more information, consult Government Code Section 87105, Regulation 18707, and the Guide to Recognizing Conflicts of Interest page at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

### Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

### Post-Governmental Employment

There are restrictions on representing clients or employers before former agencies. The provisions apply to elected state officials, most state employees, local elected officials, county chief administrative officers, city managers, including the chief administrator of a city, and general managers or chief administrators of local special districts and JPAs. The FPPC website has fact sheets explaining the provisions.

### Late Filing

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine of up to \$5,000 per violation may be imposed.

**For assistance** concerning reporting, prohibitions, and restrictions under the Act:

- Email questions to [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov).
- Call the FPPC toll-free at (866) 275-3772.

### Form 700 is a Public Document Public Access Must Be Provided

Statements of Economic Interests are public documents. The filing officer must permit any member of the public to inspect and receive a copy of any statement.

- Statements must be available as soon as possible during the agency's regular business hours, but in any event not later than the second business day after the statement is received. Access to the Form 700 is not subject to the Public Records Act procedures.
- No conditions may be placed on persons seeking access to the forms.
- No information or identification may be required from persons seeking access.
- Reproduction fees of no more than 10 cents per page may be charged.



## Questions and Answers

### General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

On a candidate statement, disclose all reportable investments, interests in real property, and business positions held on the date you file your declaration of candidacy. You must also disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you file your declaration of candidacy.

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.
- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as “acting,” “interim,” or “alternate” must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse’s income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse’s economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse’s income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

### Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of “doing business in the jurisdiction” is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

## Questions and Answers

### Continued

- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

### Income Disclosure

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at [www.fppc.ca.gov](http://www.fppc.ca.gov). (See Reference Pamphlet, page 14.)

## Questions and Answers

### Continued

Q. I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?

A. Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the "comments" section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.

Q. I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)

Q. My spouse is a partner in a four-person firm where all of their business is based on their own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?

A. If your spouse's investment in the firm is 10% or greater, disclose 100% of your spouse's share of the business on Schedule A-2, Part 1 and 50% of your spouse's income on Schedule A-2, Parts 2 and 3. For example, a client of your spouse's must be a source of at least \$20,000 during the reporting period before the client's name is reported.

Q. How do I disclose my spouse's or registered domestic partner's salary?

A. Report the name of the employer as a source of income on Schedule C.

Q. I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)

Q. I received a loan from my grandfather to purchase my home. Is this loan reportable?

A. No. Loans received from family members are not reportable.

Q. Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?

A. No. Payments received on a loan made to a family member are not reportable.

### Real Property Disclosure

Q. During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency's jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an "acquired" date?

A. No, you are not required to show an "acquired" date because you previously owned the property. However, you may want to note in the "comments" section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.

Q. I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?

A. Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.

Q. Must I report a home that I own as a personal residence for my daughter?

A. You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.

Q. I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend's property as an interest in real property on my Form 700?

A. No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.



## Questions and Answers

### Continued

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#### Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2022 the gift limit was \$520, so the Bensons may have given the supervisor artwork valued at no more than \$1,040. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.



February 1, 2023

Tracie Scott-Contreras  
Executive Director  
Madera County Workforce Investment Corporation  
2037 Cleveland Avenue Madera, CA 93637

FISCAL REVIEW  
85% FORMULA GRANT  
FISCAL YEAR 2021-22 FINAL MONITORING REPORT

Dear Tracie Scott-Contreras:

This final monitoring report is to inform you of the results of the Employment Development Department, Compliance Review Office (CRO), Workforce Innovation and Opportunity Act (WIOA), on-site monitoring review of Madera County Workforce Investment Corporation (MCWIC) fiscal systems for Program Year (PY) 2021-22.

Our review was conducted under the authority of WIOA, Sections 183(a) and 184(a)(4). The purpose of this review was to determine the level of compliance by MCWIC with applicable federal and state laws, regulations, policies, and directives related to the WIOA grant, specific to financial management activities for PY 2021-22. The MCWIC was awarded WIOA funds to provide centralized comprehensive workforce services to adults, dislocated workers, youth, and rapid response. The scope of the review covered the period of July 1, 2021 through June 30, 2022.

For the fiscal portion of the review, we focused on the following areas: fiscal policies and procedures, financial reporting, expenditures charged to the WIOA grants, cost allocation, indirect cost rate, cash management, internal controls, oversight of your subrecipients, audits, and debt collection.

The on-site review was conducted by Virginia Corry from January 17 through January 25, 2023. The exit conference for this review was held on January 27, 2023. We collected the information for this report through interviews with MCWIC representatives; and by reviewing applicable policies, procedures, a sample of PY 2021-22 expenditures, and your response to the Fiscal Monitoring Questionnaire.

## **FISCAL REVIEW RESULTS**

We conclude that we did not identify any areas of MCWIC not meeting WIOA requirements concerning financial management.

## **SUMMARY**

Because the methodology for our monitoring review included sample testing, this report is not a comprehensive assessment of all areas included in our review. It is MCWIC's responsibility to ensure that the systems, programs, and related activities comply with the WIOA grant program, federal and state regulations, and applicable state directives. Therefore, any deficiencies identified in subsequent reviews, such as an audit, would remain MCWIC's responsibility.

Please extend our appreciation to your staff for their cooperation and assistance during our review. If you have any questions regarding this report or the review that was conducted, please contact Virginia Corry, Compliance Monitoring Analyst, at [Virginia.Corry@edd.ca.gov](mailto:Virginia.Corry@edd.ca.gov) or Karen Fuller-Ware, Compliance Monitoring Supervisor, at [Karen.FullerWare@edd.ca.gov](mailto:Karen.FullerWare@edd.ca.gov).

Sincerely,

*C Harrington*

CINDY HARRINGTON, Office Chief  
Compliance Monitoring Section and Resolution Section  
Compliance Review Office

cc: See Attached Distribution List

## Distribution List

Jessica Roche, MCWIC  
Gustavo Alatorre  
Ann Brito  
Virginia Corry  
Karen Fuller-Ware  
Jennifer Gouvaia  
Cynthia Harrington  
Margo Hattin  
Kimberlee Meyer  
Yvette Quevedo  
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