

**Workforce Investment Board of Merced County
Program Planning and Development Committee
Merced Chamber of Commerce Conference Room
690 W. 16th Street, Merced, CA
Wednesday, September 22, 2004, 3:00–4:30 p.m.
Meeting Agenda**



www.co.merced.ca.us/wi/wib/wib.html

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1. Call to Order and Roll Call
 2. Approve Agenda
 3. Approve Minutes (August 25, 2004)
 4. Public Opportunity to Speak
 5. Action Agenda
 - a. Workforce Investment Board Marketing Plan
 - b. Eligible Training Provider List – Merced Adult School Clinical Medical Assistant
 - c. Eligible Training Provider List – Merced Adult School Medical Billing
 - d. Individual Training Account (ITA) Policy
 6. Workforce Investment Board Strategic Scorecard
 7. Chair’s Comments
 8. Next Meeting Date/Time—October 27, 2004, 3:00–4:30 p.m.
 9. Adjourn

“Merced County’s Workforce Investment System will keep pace with new growth, the emerging economy, and the ever-changing needs of the employers by creating a better educated, highly skilled workforce, that’s capable, prepared, and thoroughly knowledgeable.”

**Workforce Investment Board
Program Planning and Development Committee
Merced Chamber of Commerce Conference Room
690 W. 16th Street, Merced, CA
August 25, 2004, 3:00 – 4:30 P.M.
Meeting Minutes**



Members Present: Andrea Baker, Don Bergman, Sharon Cresswell, Phil Flores, Peter Fluetsch (Vice Chair), Scott Galbraith, Carol Greenberg, Anne Newins, Rick Osorio (Chair), Al Romero

Members Absent: Paul Alderete, John Fowler, Thomas Tsubota

WI Staff Present: Dave Davis, Dee Knight, Joanne Presnell

1. **Call to Order and Roll Call:** The Vice Chair called the meeting to order at 3:08 p.m. A sign-in sheet was used in lieu of roll call.
2. **Agenda:** It was *M/S/C Newins/Bergman* to approve the agenda as published.
3. **Approve Minutes (June 23, 2004):** It was *M/S/C Newins/Galbraith* to approve the June 23, 2004 minutes as written.
4. **Public Opportunity to Speak:** None.
5. **Action Agenda:**
 - a. **Workforce Investment Board Marketing Plan:** It was the consensus of the members to table this item until the September 22, 2004 meeting. This will give committee members time to review the current Marketing Plan. Staff will e-mail members the Marketing Plan along with the Day Pass Survey form.
 - b. and c. **Eligible Training Provider List – Merced Adult School Clinical Medical Assistant/Merced Adult School Medical Billing:** It was the consensus of the members to table these items until the September 22, 2004 meeting. At that time a representative from Merced Adult School will be asked to give a presentation and answer questions about the above courses. The members also asked that these items be added to the Workforce Investment Board's (WIB) Consent Agenda for September 27, 2004.

The Chair noted that anyone requesting to be added to the Eligible Training Provider List should attend the Program Planning & Development Committee meeting to make a presentation.

6. **Chair's Comments:** The Chair thanked everyone for attending the meeting. The Chair requested an update on those Worknet customers who are attending the Surviving and Thriving in the Workplace Workshop that will begin in September 2004.
7. **Other Comments:** Ms. Andrea Baker noted that the California Performance Review is out and each public agency has been affected by this Review. One recommendation is there be 20-30 WIBs versus 50

WIBs. WIB members will be asked to send letters of support regarding Local Workforce Investment Areas being allowed to remain as they are or select which local WIB they want to partner with.

Mr. Don Bergman noted that Congressman Cardoza will be the quest speaker at the Merced Chamber luncheon on September 2, 2004, at the Branding Iron. The Congressman will be speaking on the following:

- a. The Energy Bill that is in Congress,
- b. Water Problems in California, and
- c. Endangered Species Act.

8. Next Meeting Date/Time: Next meeting is September 22, 2004, 3:00-4:30 p.m., in the Merced Chamber of Commerce Conference Room, 690 W. 16th Street, Merced.

9. Adjourn: The meeting adjourned at 3:48 p.m.

Minutes prepared by Devilla D. Knight.

TO: WIB Program Planning & Development

DATE: 9/22/04

FROM: Worknet Leadership Team

For Action

For Information

For Discussion

SUBJECT: Workforce Investment Board (WIB) Marketing Plan

PROPOSED MOTION(S): To approve adding language to the WIB Marketing Plan that describes how the effectiveness of the plan will be evaluated.

DISCUSSION: During the certification of the Merced Employment Resource Center, Merced's full service One-Stop, the evaluation team questioned how the effectiveness of the Marketing Plan was determined. The Worknet Leadership Team developed and adopted the following language for WIB approval, to resolve that issue:

The Worknet Customer Satisfaction Survey is currently the mechanism used to measure customer satisfaction and customer awareness of the Worknet One-Stop system and is also the tool used as the method to evaluate marketing effectiveness. The responses are compiled and entered into the Case Management System and a monthly Participant Data Report is generated and reviewed by staff, the Worknet Leadership Team and WIB committees. As appropriate and viable, decisions regarding marketing strategies are considered and implemented.

**ATTACHMENT(S):
Marketing Plan**

**Merced County Workforce Investment Board
and Worknet One-Stop System
Marketing Plan**

February 2003

Merced, California

1. POSITION STATEMENT

The Merced County Workforce Investment Board (WIB) was established in June of 2000 pursuant to the federal Workforce Investment Act of 1998. The WIB is the successor to the previous Private Industry Council (PIC). The staff “arm” to the WIB is the Department of Workforce Investment (Dept. of WI) established in 1982 with the Federal Job Training Partnership Act. For twenty years, the WIB and the predecessor PIC have overseen Dept. of WI delivery of job-training services in Merced County.

Dept. of WI is also contracted to be the “One Stop” operator for workforce services, coordinating with other workforce agencies through “Worknet” of Merced County.

The Workforce Investment Board is the policy-making body, while Worknet is the service delivery organization. Because the WIB establishes policy and contracts for services, this marketing plan covers both WIB and Worknet.

Mission: The WIB’s mission statement is:

“Merced County’s Workforce Investment System will keep pace with new growth, the emerging economy, and the ever-changing needs of the employers by creating a better educated, highly skilled workforce, that’s capable, prepared and thoroughly knowledgeable.”

Products and Services: The **Workforce Investment Board** does not directly offer services to outside clients. Rather, the WIB is the policy-setting body, which guides the workforce system in Merced County.

Worknet is the One-Stop service delivery system, coordinated by the Department of Workforce Investment as the One-Stop operator. Worknet (the One Stop system) offers services and information to businesses and individual jobseekers through a system of Worknet one-stop centers:

- Workshops on resume writing, job search, and interviewing techniques
- Career development information for any member of the public
- Assistance to economic development organizations in presenting and marketing resources to prospective employers
- Entrepreneurial development and follow-up services

Services to Employers: These are listed by the services that are used most by employers.

- **Recruitment, pre-screening, and referrals of job applicants.** The employer provides the job requirements and the candidates are pre-screened accordingly. The employer makes the decision on who is hired.
- **On-The-Job Training (subsidized).** The employer contracts with the WIB/One-Stop operator, interviews and selects the eligible client, prepares a training plan with staff for the client, and is reimbursed for a portion of the training expense. A cost savings can be realized by the employer due to reimbursements for the extraordinary costs of training.

- Customized training for businesses. A training plan is developed and implemented to assist an employer in providing skills and training to a group of employees.
- Tax Advantages. For the Merced-Atwater Enterprise Zone, the WIB/Dept. of WI serves employers by certifying ("vouchering") qualified employees for Enterprise Zone tax credits. The State EDD certifies individuals in target populations for the federal Work Opportunity Tax Credit and Welfare-to-Work Tax Credit.
- Consulting on personnel practices. This is provided at the request of employers.
- Labor market information. Vast amounts of local information to assist in making important business decisions are available.
- Testing job applicants. Applicants are tested for skills and qualifications specified by the employer.
- Space for interviewing. An interview room is provided for interviewing applicants. Video conferencing equipment is available for long distance interviewing.
- Rapid Response. Staff comes to the aid of an employer who is downsizing to provide options for the personnel who are being released such as employment retraining information.

Services to Job Seekers: Worknet provides services to eligible persons seeking employment and training.

- Recruitment, assessment, pre-screening and job referrals. Securing employment for clients evolves around these activities.
- Job Search workshops. Provides information on how to look for work, prepare for an interview, and keep a job once obtained.
- Labor Market Information. A valuable aid in determining a career choice.
- Resume assistance. Many employers require resumes along with the employment application and WIB/Dept. of WI provides training and coaching in this skill.
- Phone banks, computers, and resource library. Tools available for those looking for work.
- Career counseling. Assists individuals in determining their career alternatives.
- School based and Work based training, retraining. Necessary when a person needs to learn new job skills, update old ones, or is considering a career change.
- Basic Education and GED. Is available for those deficient in reading and/or math and do not have a high school diploma.
- Supportive Services. Information regarding available supportive services is provided.
- Eligible Training Provider List. A list of training providers who are determined eligible by the state to provide training funded by the Workforce Investment Act.

2. MARKET ANALYSIS

The market has been classified into four categories: Businesses, Job Seekers, Community and Political Leaders, and general awareness. Different methods are needed to reach the four different segments of the market

1. Businesses: The business market addressed by this plan falls into three areas:

- Existing Merced County employers that have been successful for job placement in the past. This is the primary market and is the most fruitful, with its base of repeat customers.
- Other existing businesses in Merced County. These are already here and are easily contacted; they may know WIB/Dept. of WI by word of mouth.
- Businesses outside Merced County, which may expand here. These are the most difficult to reach and it involves working with economic developers. Outside businesses may know or have experience with other WIA providers.

Services offered to businesses can be addressed to new employees or their existing employees.

The WIB needs to address this market in order to secure increased participation in the WIB from employers. Worknet needs to address this market in order to make sure Worknet services are known and used by employers.

2. Job Seekers: Job seekers may include any person who is seeking new or better employment, not only the unemployed or economically disadvantaged. In addition, youth are a specific identifiable segment of the broader market of job-seekers.

Worknet has a critical need to address job seekers in order to inform them of Worknet program services, and to build general awareness of Worknet. The WIB has a lesser need to address job seekers in order to assure that they know WIB/Worknet services are open to all.

3. Political and Community Leaders: These leaders may include: legislators (state, federal, and local), members of various community boards, business leaders, agricultural leaders, educators, and economic developers.

The WIB needs to address these leaders in order to obtain their participation, support and cooperation for the WIB. Worknet needs to address these leaders in order to ensure that community leaders are aware of Worknet program services and results, and are able to address constituents.

4. General Awareness: Although not a critical need, the general public needs to be addressed as part of the marketing program. Creation of a general awareness of the WIB and Worknet will help address job seekers, and will support efforts with political and community leaders.

3. GOALS OF THE MARKETING PLAN

Mission and Goals

In general, the marketing mission is to:

- present the Workforce Investment Board (WIB) as the policy maker, influencer, facilitator, and change agent for workforce development in Merced County, and
- present Worknet as the service provider carrying out workforce development activities.

An active marketing program will make the WIB more politically effective and help develop useful relationships. Active marketing of Worknet allows customers to know about services in order to take advantage of them. In addition, employers can benefit from using services and both can save money.

Specifically, the marketing campaign should:

- Create a positive name recognition for the WIB, one that is well known and respected.
- Clarify/amplify image with employers, to make employers aware of the services offered and how they would benefit from using them.
- Assume a position of preeminence for contact in job training by being the first point of contact by both employers seeking qualified employees and job seekers desiring job training and employment opportunities.
- Increase visibility among the economically disadvantaged/dislocated worker clientele, so that those in need of services will know what the services are and how to access them.

The Message: Desired Image for the WIB and Worknet

WIB attributes which will be stressed as the message in the marketing campaign:

- The WIB is a private-public team
- The WIB represents experienced leadership
- The WIB makes a difference
- The WIB is local business driven, and voluntary
- The WIB is authoritative, yet user-friendly
- The WIB is dedicated, professional, competent
- The WIB establishes community standards for workforce development
- The WIB serves needs of employers and job seekers
- The WIB generates new resources for Merced County
- The WIB directs the services network

Worknet attributes which will be stressed as the marketing message:

- Worknet is helpful, easy, simple and user friendly
- Worknet is 'the place to go', with three convenient locations
- Worknet is one stop for all your needs
- Worknet is for everyone, not just special populations
- Worknet is professional and reliable
- Worknet is low cost
- Worknet offers business services, like on-the-job training
- Worknet has community resources

4. MARKETING STRATEGY

Media Choice

“Media” includes any method by which the message can be delivered, ranging from casual personal contact to broadcast media such as radio and television. All forms of media were considered in developing the choices recommended in this plan. Of particular importance is considering the degree to which a message can be targeted to a particular audience, and the cost of the media.

The following page illustrates the degree of targeting and cost of the various media choices available. Specific media choice is listed below by target markets, which were identified earlier in this Plan. The choices are further identified as to their relevance for the WIB or Worknet.

Effective Choices for Communicating with the Employer Market

About the WIB

Direct mail/e-mail
 Personal contact
 Presentations (PowerPoint)

- Employer Advisory Council
- Enterprise Zone workshops
- ETP orientations
- Business and civic groups

 Radio public service announcements
 Brochures
 Personal contact by business services representatives
 WIB member badges

About Worknet

Personal contact by business services representatives
 Message: personal representatives
 Piggyback on events such as Job Fairs
 Networking

Effective Choices for Communicating with the Market of Job Seekers

About the WIB

No specific activities targeted; will simply benefit from the overflow of activities targeted to other audiences

About Worknet

Mall kiosk
 Billboards
 Building signage
 How can Job Fair be improved?
 Media placement – personal profiles
 Radio
 EDD profiling and target mail
 Maybe cable TV

Effective Choices for Communicating with Political and Community Leaders

About the WIB

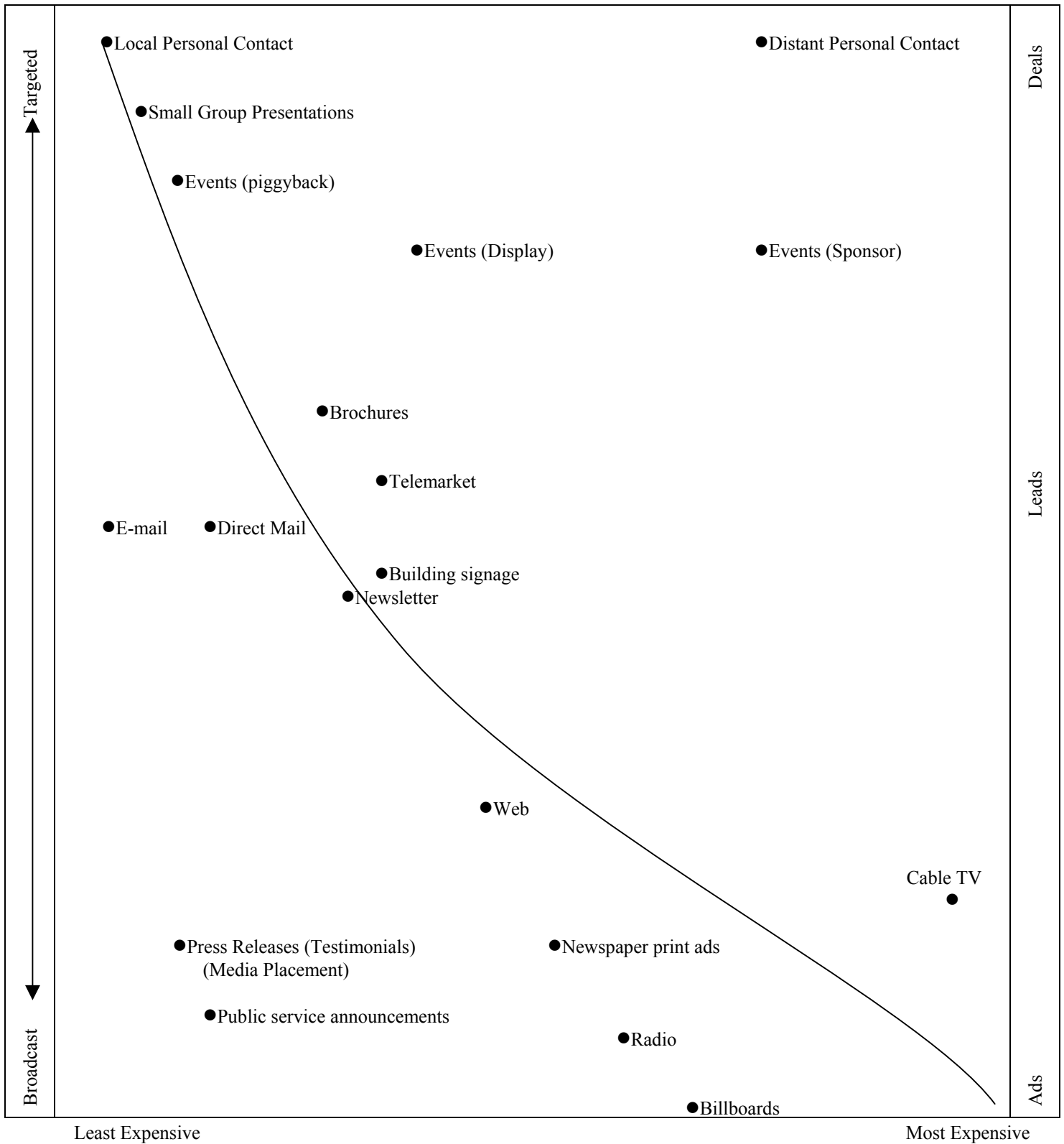
Personal contact
E-mail – Newsletter (Combine Worknet with WIB information)
Direct mail – Consistent, repetitious
Brochure
Website – cross-market and mention in other publications, links from other sites (i.e., Chamber, Merced Net, California Chambers, MCAG, City, etc.)
Piggyback events
Invite legislators to receive awards
Invite legislators to present awards
Invite legislators to visit/tour Worknet

About Worknet

This will primarily be “overflow” from other activities targeted to other markets. However, overview information and testimonials expressed in brochures will be particularly helpful.

As appropriate, all marketing and advertising on behalf of the Workforce Investment Act and Worknet will include the Workforce Investment Board name and logo.

MEDIA EXPOSURE TO COST CURVE



Non-Staff Budget Needs

“Merced County’s Workforce Investment System will keep pace with new growth, the emerging economy, and the ever-changing needs of the employers by creating a better educated, highly skilled workforce, that’s capable, prepared, and thoroughly knowledgeable.”

5. CARRYING OUT THE PLAN

The Following Implementation Chart shows the plan of action, the cost, and who will be involved.

WORKNET MARKETING CAMPAIGN

NEWSPAPER ADS

Client Outreach	Job Development Unit (JDU) ad every 2 weeks	\$ 2,500
	Minority Newspapers	613
Employer Outreach	1/4 pg quarterly ad (\$500 ea)	2,000
General	Worknet monthly ad 1/8 pg (\$300 ea)	3,600
TV Ads		
Client Outreach	Cable TV Ad (Apr-Jun 2003)	5,000

RADIO ADS

Client Outreach	Worknet Ads HOT105/KUBB (Jul-Sep 2002)	7,000
Employer Outreach	Radio 1480 (Fall 2002)	4,000

BROCHURES

Client Outreach	One-Stop Brochure	3,000
Employer Outreach	Worknet Brochures	6,000

FLYERS / PITD REPORT / PRINTING

Employer Outreach	PITD Report Insert for Chamber Newsletter (Greater Chamber and County Chamber)	1,000
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FOLDERS

Client Outreach	Workshop/Assessment	4,000
Employer Outreach	OJTs and Services	2,000

MARKETING ITEMS (pens, pencils, balloons, etc.)

Client Outreach		1,500
Employer Outreach		1,500
Job Fair/Health Fair		1,500

EMPLOYER OUTREACH

Ad in CVOC Program	1/4 page ad	100
Business Gazette	1/4 page ad (Quarterly)	480
Merced Today	1/4 page ad	450

GENERAL

Materials, Supplies, and Food for Special Events	Employer Outreach Appreciation	4,000
	Worknet Post Cards/Business Cards	3,000
	Worknet Name Badges for ERCs	500
Community Awareness	Bldg Signage	10,000
Billboards	(Oct-Mar 2003)	10,000
Annual Report (Published)	PITD	2,000
Web Advertising		1,500
JOB FAIR		
Fairgrounds/Rent Space		<u>1,200</u>

TOTAL		\$ 78,443
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WIB MARKETING CAMPAIGN

Radio	Piggy back on Worknet, Action Business Center, etc.	\$ 1,000
Media placement	PSA - piggyback on Worknet (including newsletters)	
Direct Mail	PITD staff	1,500
E-Mail	PITD staff	
Newsletter	PITD staff	1,500
Website	PITD staff	
Brochures	PITD staff	1,500
Presentations/events	WIB Board/Members	1,000
Account representatives		
Legislator awards		500
Piggyback events	Host mixers, get introduced	<u>500</u>
TOTAL		\$ 7,500

WIB SPECIAL EVENTS

WIB Special Events		<u>\$ 10,000</u>
TOTAL		\$ 10,000

BUDGET SUMMARY

WIB campaign		\$ 7,500
WIB Special Events		10,000
Worknet campaign		<u>78,443</u>
TOTAL		\$ 95,943

TO: Program Planning & Development

DATE: 9/22/04

FROM: WIB Staff

For Action

For Information

For Discussion

SUBJECT: Eligible Training Provider List (ETPL) Addition

PROPOSED MOTION(S): Approve the Merced Adult School's Boston Reed College Clinical Medical Assistant course for addition to the state ETPL.

DISCUSSION: The Workforce Investment Board approved an ETPL policy on June 20, 2000. The Workforce Investment Act requires that training providers who wish to access WIA funds must submit applications to be placed on the state training list. Providers must meet all local and state criteria; agree to provide approved training to WIA-enrolled participants; supply required client data for long-term follow-up and they must agree to abide by all WIA-required regulations and/or laws.

The application from Merced Adult School for its Boston Reed College Clinical Medical Assistant course is complete, and meets the requirements for inclusion in the ETPL. The program is registered by the Bureau for Private Post-Secondary and Vocational Educational (BPPVE), and approved by the California Department of Education. Cost of the program is \$995.

**ATTACHMENT(S):
Application**

01. Provider Code (FEIN)
68-0444480

02. CIP Code

For Internal Office Use Only

Program Code

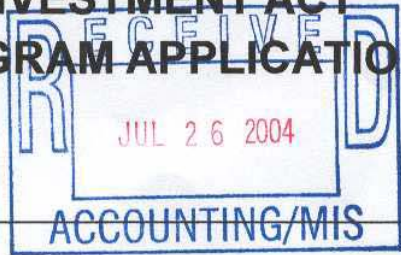
03. Subgrantee Code

04. Agency Code

05. Date Received By LWIB

06. Local Program Code

**WORKFORCE INVESTMENT ACT
TRAINING PROGRAM APPLICATION**



Provider Name
Boston Reed College

07. Program Name
Clinical Medical Assistant

08. Program Description
120 hours in 17 weeks, plus a 160-hour externship, coordinated by Boston Reed. Topics are covered through a combination of lecture and practical skill training.

09. Training Site Address
Merced Adult School 50 East 20th Street

City, State
Merced

10. ZIP
95344

11. County
Merced

12. Listed On Other State's ETP
 1-Yes
 2-No

13. ADA Compliant
 1-Yes
 2-No

14. Total Hours Of Instruction
120 plus 160 hours externship

15. Credits
NA

16. Non-Credit
 1-Yes
 2-No

17. Credit Time
 1-Semester
 2-Quarter

Total Program Cost

18. Tuition \$ _____

19. Fees \$995

20. Expenses \$ _____

Total \$995.00

21. Mode Of Delivery
 1-Classroom
 2-Internet
 3-Correspondence
 4-Broadcast
 5-Computer Based Instruction

When Program Is Offered

22. Days 1-Yes 2-No

23. Evenings 1-Yes 2-No

24. Weekends 1-Yes 2-No

25. Frequency of Offering
 1-Weekly
 2-Monthly
 3-Quarter
 4-Semester
 5-Other

26. BPPVE Approval Status
 1-Approved
 2-Temporary Approval
 3-Registered
 4-Exempt
 9-Not Applicable

27. BPPVE Approval Expiration Date

28. Other BPPVE Approved Programs
 1-Yes
 2-No

29. Registered Apprenticeship
 1-Yes
 2-No

30. Registered Date
NA

Other List Criteria:

31. CDE Approved 1-Yes 2-No

32. COCCC Approved 1-Yes 2-No

33. Proven Effectiveness *No longer used*

34. Employer Support *No longer used*

35. Industry Authorized *No longer used*

36. Continuing Education Units (CEU)
Certified Nursing Assistants earn 48 CEUs

37. CEU Granting Institution
Nursing board

38. Resources Required
 1-Yes
 2-No

39. Program Goal
 1-Skill Attainment
 2-Certificate
 3-Registration
 4-License

5-Associate Degree
 6-Baccalaureate Degree
 7-Other


40. Credentialing Body
Program meets guidelines of State of California Medical Board and the California Medical Assistant Association (CMAA).

41. Projected Hourly Wage After Program Completion
\$10-15

42. Prerequisites
Recommended that student be at least 18 years of age and hold a high school diploma or equivalent. Enrollment requires students must pass English and Math assessment exams with 80% or better.

43. Skills Sets
Clinical Skills include vital signs, wound care, collection of specimens, administration of oral and injectable medications, assist physician with examinations, EKG testing.

WIA Training Program Application (continued)

44. Curriculum		45. Relevant Occupations (Soc/O*Net Code)	
Course Code	Course Title	Code	Title
06.079.362	Clinical Medical Assistant	31-9092.00	Medical Assistant
		079-362.010	Medical Assistant
		46. Relevant Occupation Recommendation	
		Soc/O*Net Category	Description
		43-6013.00	Medical Secretary
		43-9041.01	Insurance Claims clerk
Accessibility 47. On-Site Parking <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No 48. Public Transportation <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No 49. Disabled Student Access <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No 50. Sign Language <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No 51. Other Languages <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No 52. Other <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No		53. Target Audience Persons wishing to enter or advance in the healthcare industry 54. Average Class Size 20 55. Equipment to be Used Vital sign observation equipment, sterile clinical materials, (disposable and durable); EKG testing equipment.	
INITIAL PERFORMANCE INFORMATION			
56. Period Begin Date	57. Period End Date	58. Participant Universe	59. Average Hourly Wage at Placement
60. Program Completion Rate	61. Entered Employment Rate	62. Skill/Credential Attainment Rate	63. Retention Rate
I certify that the information submitted on this application is true and correct. I also agree to supply the required performance information and seed data on all students in order to calculate performance measures for subsequent eligibility determination. In addition, all performance outcome data shall be made available upon request for audit purposes.			
64. Printed Name of Provider Representative		65. Title	66. Date
Dana Bernard		President	June 7, 2004
Signature			
			

ETPL EPGA

TO: Program Planning & Development

DATE: 9/22/04

FROM: WIB Staff

For Action

For Information

For Discussion

SUBJECT: Eligible Training Provider List (ETPL) Addition

PROPOSED MOTION(S): Approve the Merced Adult School's Boston Reed College Medical Billing course for addition to the state ETPL.

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The application from Merced Adult School for its Boston Reed College Medical Billing course is complete, and meets the requirements for inclusion in the ETPL. The program is registered by the Bureau for Private Post-Secondary and Vocational Educational (BPPVE), and approved by the California Department of Education. Cost of the program is \$995.

**ATTACHMENT(S):
Application**



**Employment
Development
Department**

State of California

WORKFORCE INVESTMENT ACT TRAINING PROGRAM APPLICATION

01. Provider Code (FEIN) 68-0444480	For Internal Office Use Only
02. CIP Code	
03. Subgrantee Code	
04. Agency Code	
05. Date Received By LWIB	
06. Local Program Code	

Provider Name
Boston Reed College

07. Program Name Medical Billing	08. Program Description This course combines 112 hours of classroom instruction with a 120 hour off-site externship. AS a medical biller you will process medical claims for a variety of insurance carriers.
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09. Training Site Address Merced Adult School 50 East 20th Street	City, State Merced	10. ZIP 95344	11. County Merced
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12. Listed On Other State's ETPL <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No	13. ADA Compliant <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No	14. Total Hours Of Instruction 112	15. Credits NA	16. Non-Credit <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No	17. Credit Time <input type="checkbox"/> 1-Semester <input type="checkbox"/> 2-Quarter
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Total Program Cost 18. Tuition \$ _____ 19. Fees \$995 20. Expenses \$ _____ Total \$995.00	21. Mode Of Delivery <input checked="" type="checkbox"/> 1-Classroom <input type="checkbox"/> 2-Internet <input type="checkbox"/> 3-Correspondence <input type="checkbox"/> 4-Broadcast <input type="checkbox"/> 5-Computer Based Instruction	When Program Is Offered		25. Frequency of Offering <input type="checkbox"/> 1-Weekly <input type="checkbox"/> 2-Monthly <input type="checkbox"/> 3-Quarter <input checked="" type="checkbox"/> 4-Semester <input type="checkbox"/> 5-Other	26. BPPVE Approval Status <input type="checkbox"/> 1-Approved <input type="checkbox"/> 2-Temporary Approval <input checked="" type="checkbox"/> 3-Registered <input type="checkbox"/> 4-Exempt <input type="checkbox"/> 9-Not Applicable
		22. Days <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No	23. Evenings <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No		

28. Other BPPVE Approved Programs <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No	29. Registered Apprenticeship <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No	30. Registered Date NA	Other List Criteria: 31. CDE Approved <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No 32. COCCC Approved <input type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No 33. Proven Effectiveness <i>No longer used</i> 34. Employer Support <i>No longer used</i> 35. Industry Authorized <i>No longer used</i>
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36. Continuing Education Units (CEU) Certified Nursing Assistants earn 48 CEUs	37. CEU Granting Institution Nursing board
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38. Resources Required <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No	39. Program Goal <input checked="" type="checkbox"/> 1-Skill Attainment <input type="checkbox"/> 2-Certificate <input type="checkbox"/> 3-Registration <input type="checkbox"/> 4-License	<input type="checkbox"/> 5-Associate Degree	40. Credentialing Body NA
		<input type="checkbox"/> 6-Baccalaureate Degree <input type="checkbox"/> 7-Other	

42. Prerequisites
Recommended that student be at least 18 years of age and hold a high school diploma or equivalent. Have basic computer skills and a medical background. Enrollment requires students must pass English and Math assessment exams with 80% or better.

43. Skills Sets
Will know how to process Workers' Compensation claims, Personal injury, Medi-care, and Medi-cal claims. This program is designed to prepare students with the knowledge, competencies, and technical skills for entry level positions as a Medical Biller.

WIA Training Program Application (continued)

44. Curriculum		45. Relevant Occupations (Soc/O*Net Code)	
Course Code	Course Title	Code	Title
06.214.362	Medical Billing	43-6013.00	Medical Secretary
		43-9041.01	Insurance Claims clerk
		46. Relevant Occupation Recommendation	
		Soc/O*Net Category	Description
Accessibility 47. On-Site Parking <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No 48. Public Transportation <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No 49. Disabled Student Access <input checked="" type="checkbox"/> 1-Yes <input type="checkbox"/> 2-No 50. Sign Language <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No 51. Other Languages <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No 52. Other <input type="checkbox"/> 1-Yes <input checked="" type="checkbox"/> 2-No		53. Target Audience Persons wishing to enter or advance in the healthcare industry 54. Average Class Size 20 55. Equipment to be Used Computer software, reference books, Medi-Soft software	
INITIAL PERFORMANCE INFORMATION			
56. Period Begin Date	57. Period End Date	58. Participant Universe	59. Average Hourly Wage at Placement
60. Program Completion Rate	61. Entered Employment Rate	62. Skill/Credential Attainment Rate	63. Retention Rate
I certify that the information submitted on this application is true and correct. I also agree to supply the required performance information and seed data on all students in order to calculate performance measures for subsequent eligibility determination. In addition, all performance outcome data shall be made available upon request for audit purposes.			
64. Printed Name of Provider Representative		65. Title	66. Date
Dana Bernard		President	June 7, 2004
Signature: <i>Dana Bernard RN</i>			

ETPL EPGA

TO: Program Planning & Development Meeting

DATE: 09/22/04

FROM: WIB Staff

For Action

For Information

For Discussion

SUBJECT: Individual Training Account (ITA) Policy

PROPOSED MOTION(S): Approve a new ITA Policy.

DISCUSSION: On September 11, 2003, the WIB approved a new ITA Policy. The new policy was instituted because of the 28% funding reduction for 2003 and the need for a timely management process. The new policy included: 1) The ITA cap and number of ITAs per two-year period were reduced; 2) A cap of \$2,500 per ITA (instead of \$6,000) with the authority to exceed the ITA cap resting with the Assistant Director of the One-Stop Operator, or in his/her absence, the Program Manager of the Worknet Employment Resource Center; and 3) A participant can be issued more than one (1) ITA within a two-year period (instead of no more than three (3) during a two-year period) as long as the total cost of the ITAs does not exceed \$2,500.

The training most clients have received has cost more than the \$2,500 cap. A check of the cost of ETPL training courses in Merced, Stanislaus and Fresno Counties reveals that roughly 75% of the training offered costs more than the \$2,500 cap. In order to provide training to WIA-enrolled participants, the request to exceed the ITA cap has become the norm rather than the exception.

A change in the policy is recommended with a new cap of \$4,500, with the same caveat of having to request for authority to exceed the cap resting with higher management. This action will reduce staff workload, while allowing participants access to training who do not have other financial resources available.

**ATTACHMENT(S):
ITA Policy**

ITA Policy

- **Policy**
- **Individual Training Accounts (ITAs) - General Provisions**
- **Training Activities**
- **Eligibility for Training**
- **Training Priority System**
- **Limitations of Financial Support**

I. Policy

- A. In order to provide customer choice in the selection of training providers, the Individual Training Account (ITA) system was established. Through this system, eligible Workforce Investment Act (WIA) participants are able to select their choice of training. The Merced County Workforce Investment Board, through the One-Stop Operator, the Merced County Department of Workforce Development (WI), shall make available classroom training in occupations that are directly connected to occupations in demand, as established by the Board. Occupational classroom training will be provided through training vendors evaluated, approved and placed on the state Eligible Training Provider List (ETPL).
- B. The Merced County Workforce Investment Board, through WI, shall provide training services that lead to a certificate/license/credential/degree, a competency or skill recognized by employers, or a training regimen that provides individuals with additional skills or competencies generally recognized by employers.
- C. The Merced County Workforce Investment Board, through the Department of Workforce Development, reserves the right to make exceptions to this policy, on a case-by-case basis, should individual circumstances warrant exception.

II. Individual Training Accounts (ITAs) - General Conditions

- A. Except as provided in the Workforce Investment Act of 1998 and associated regulations, training services provided to eligible participants shall employ individual training accounts (ITAs) issued through the One-Stop Delivery System.

The “maximum Training Funds Available” on any individual ITA shall not exceed four thousand five hundred dollars (\$4,500) without prior, written approval of the Assistant Director of the One-Stop Operator or in his/her absence, the Program Manager of the One-Stop Career Center

- i. In no event shall an ITA carry a time or dollar balance after the program of training is either completed or terminated.
- ii. The maximum length of training under a single ITA shall be two years.
- iii. More than one ITA may be issued to a participant within a two- year period provided the total cost of the ITAs does not exceed \$4,500.
- iv. An ITA shall cover the cost of training including tuition and other training-related items supplied by the training provider (e.g., books, license fees, training materials, registration fees, supplies, uniforms, DMV printouts, physical examinations, immunizations, health fees and insurance) but will not include or consider the costs of supportive services. Supportive services, if appropriate, shall be delivered pursuant to the Board’s Supportive Services Policy.

- B. Both the student and a representative of WI will sign a completed ITA. Signatory authority of WI on the ITA is the Program Manager responsible for Training Services at each of the Department's geographic locations (authorized by the Merced County Board of Supervisors on 7/25/00 and Department of Workforce Development Director on 7/25/00). Once a completed ITA is signed by the student and WI representative, copies will be provided to the Accounting/MIS unit of WI, the school/provider, the case manager and the student. Each geographic location will use the same ITA form, but will utilize Certificate Numbers unique to their location to designate point of origin. Initially, the Livingston office will issue sequentially ITA certificate numbers 1 - 999, Los Banos will issue sequentially ITA certificate numbers 1000-1999, and Merced will issue sequentially ITA certificate numbers 2000-2999.
- C. WI shall ensure that all training activities are provided in sites that are accessible to individuals with disabilities, and that all reasonable accommodations are made to provide services to this population.

III. Training Activities

- A. The types of training services made available through WI under the Workforce Investment Act shall include:
 - i. Occupational skills training as well as training for non-traditional employment, offered in a classroom environment;
 - ii. Skill upgrading and retraining, including training courses that build upon the individual's existing skills.
- B. Additional training services, not covered by this policy, include:
 - i. Programs that combine workplace training with related instruction, such as customized training programs;
 - ii. On-the-job training;
 - iii. Work experience;
 - iv. Entrepreneurial training;
 - v. Adult education and literacy activities.

IV. Eligibility For Training

WI shall make available Workforce Investment Act funds for the provision of occupational classroom training to eligible populations in accordance with Section 134(d)(4)(A) of the Act. Eligible populations shall include adults, dislocated workers, and incumbent workers who:

- i. Are unable to obtain employment that leads to economic self-sufficiency through core and intensive services;
- ii. After an interview, evaluation or assessment, and case management, have been determined by a one-stop operator to:
 - a. be in need of training services;
 - b. have the skills and qualifications to successfully participate in the selected program;
 - c. have selected programs of training services that are directly linked to the employment opportunities in the Merced County area, central San Joaquin Valley, or in another area in which the customer is willing to relocate;
 - d. are unable to obtain sufficient grant assistance, including PELL grants;

- e. require support beyond the assistance made available under other grant assistance programs.

V. Training Priority System

- A. If and when the Board declares that funds allocated to a local area for adult employment and training activities under paragraph (2)(A) or (3) of section 133 (b) are limited, then WI shall provide priority services to recipients of public assistance and other low-income individuals for intensive and training services. Low-income individuals are defined as:
 - i. receives, or is a member of a family that receives, cash payments under a Federal, State, or local income-based public assistance program;
 - ii. received an income, or is a member of a family that received a total family income, for the six-month period prior to application for the program involved (exclusive of un-employment compensation, child support payments, payments described in subparagraph (A), an old-age and survivors insurance benefits received under Section 202 of the Social Security Act (42 U.S.C. 402) that, in relation to family size, does not exceed the higher of:
 - a. the poverty line, for an equivalent period; or
 - b. 70% of the lower living standard income level, for an equivalent period;
 - iii. is a member of a household that receives (or has been determined within the six-month period prior to application for the program involved to be eligible to receive) food stamps pursuant to the Food Stamp Act of 1977 (7 U.S.C. 2011 et. Seq.);
 - iv. qualifies as a homeless individual, as defined in subsections (a) and (c) of Section 103 of the Stewart B. McKinney Homeless Assistance Act (42 U.S.C. 11302);
 - v. is a foster child on behalf whom State or local government payments are made; or
 - vi. in cases permitted by regulations promulgated by the Secretary of Labor, is an individual with a disability whose own incomes meets the requirements of a program described in subparagraph (a) or of subparagraph (b), but is a member of family whose income does not meet such requirements.

VI. Limitations Of Financial Support

- A. For those clients who elect to attend occupational classroom training within the local labor market area (defined as from Fresno County to the south to Stanislaus County to the north), the maximum amount of funds available will be limited to the needs identified in the Individual Employment Plan.
- B. For those clients who elect to attend occupational classroom training outside of the defined labor market area, no supportive services will be made available to the client by the Department of Workforce Development.
- C. For those clients who must attend occupational classroom training outside of the defined local labor market area because there are no providers of the training within the area, the provisions for electing to attend within the local labor market area will apply.

TO: WIB Program Planning & Development

DATE: 09/22/04

FROM: WIB Staff

For Action

For Information

For Discussion

SUBJECT: WIB Strategic Scorecard

PROPOSED MOTION(S): To discuss and accept the Measurement Categories assigned to the Program Planning & Development Committee.

DISCUSSION: The Merced County Workforce Investment Board Strategic Scorecard has been completed and is now being reviewed by each committee. The scorecard will be a tool used to evaluate fundamental performance areas that are vital to the WIB, and create a set of measures for each area. Once all applicable committees have reviewed the scorecard, it will be sent to the Workforce Investment Board for approval.

The Executive Committee has not formally reviewed the scorecard, but was provided the scorecard during its August meeting and voiced approval.

**ATTACHMENT(S):
WIB Strategic Scorecard**

MERCED COUNTY WORKFORCE INVESTMENT BOARD STRATEGIC SCORECARD

WIB GOALS

Goal # I Train and attract adaptable workers to fill industry needs.

Goal # II Influence the K-12 education system to design and implement strategies that provide students knowledge of employee skills and attitudes and develop metrics to assure success.

Goal # III Become an active advocacy voice and take political action on workforce development issues at the local, state, and national levels.

Measurement Category: Customer Perspective

Measure/Indicator	Metrics	Method	How Often Review	Responsible WIB Committee
1. Business Customer Satisfaction				
a. Employer Needs Are Being Met	80% Satisfaction Rate & Increase in the # of Employers using Worknet Services	Face to face 10 Question Survey of 30 Employers	Annually	QA & BSU
b. Are the Right Industries Targeted • Economic Development Targeted Industries • Growth Industries	Compare targets and adjust industry focus, if necessary	Review LMI (Growth Industries & Early Warning Data (in development))	Biannually	PP&D
2. Job Seeker Customer Satisfaction				
a. Job Seeker Needs Are Being Met	90%	Worknet Day Pass	Monthly	QA
b. Input from Customers Is Used To Improve Services	Rating to meet or exceed	Benchmark to similar service organizations	Biannually	QA
3. Workforce Development Advocacy/Awareness	# Of Face to Face Meetings compared to previous year # Of Written	Meetings with Legislators Written Communication with	Biannually	Executive

MERCED COUNTY WORKFORCE INVESTMENT BOARD STRATEGIC SCORECARD

	<p>Communications compared to previous year</p> <p>Voting record of Legislators</p> <p>Positive impact to Support Local Control</p> <p>Stable or increased WIA Funding</p>	<p>Legislators (requesting a response from them)</p> <p>Invitations to WIB Meetings</p> <p>Invitations to Worknet, i.e., for a tour, Chamber Mixer, etc.</p>		
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Measurement Category: Internal Operations/Organizational Effectiveness

Measure/Indicator	Metrics	Method	How Often Review	Responsible WIB Committee
1. Program Accountability:				
a. Plan vs. Actual Participant Activity				
• Numbers	Planned vs. Actual	Participant Reports	Monthly	QA
• Demographics	Participants vs. Merced Co. Demographics	Participant Reports	Biannually	QA
• Performance Measures	Attain 80% level on Goals	Performance Reports	Quarterly	QA
b. Report Results:				
• Audits	Zero Findings	County Audit	Annually	QA

MERCED COUNTY WORKFORCE INVESTMENT BOARD STRATEGIC SCORECARD

<ul style="list-style-type: none"> • Monitoring • Youth Quarterly Program Reports <li style="padding-left: 20px;">Out-of-School Youth <li style="padding-left: 20px;">Younger Youth <p>c. Resources are Allocated Appropriately:</p> <ul style="list-style-type: none"> • Pilot Program in a specific Industry cluster (offering career ladders or move up strategy) • Quality Controls • Productivity 	Zero Findings	EDD Monitoring WI Monitoring	Annually Biannually	QA
	Acceptable Progress based on contract timeline	Report from MCOE	Quarterly	YC
	Acceptable Progress based on contract timeline	Report from MCOE	Quarterly	YC
	Review results of training job and placements in the industry	Identify and select an Industry cluster	Biannually	PP&D
	Improved Scores	Customer Satisfaction Data	Yearly	QA
Attainment	Performance Measures	Yearly	QA	

Measurement Category: Financial/Market Perspective

Measure/Indicator	Metric	Method	How Often Review	Responsible WIB Committee
1. Expenditures including: <ul style="list-style-type: none"> • Obligations • Accruals (Expenses) • Encumbrances • By funding source • By service • Plan vs. Actual 	80% Expended by End of Year	Fiscal Reports	Monthly	Finance

MERCED COUNTY WORKFORCE INVESTMENT BOARD STRATEGIC SCORECARD

2. Revenue & Resources:				
a. Grants	#s Applied for and Source #s Received and \$\$ Amounts	WI Report	Biannually	Finance
b. Revenue Generation	# of Sources Amount of \$\$	WI Report	Biannually	Finance

Measurement Category: Learning and Innovation

Measure/Indicator	Metric	Method	How Often Review	Responsible WIB Committee
1. Progress in Preparation for Worknet Recertification	On Schedule	Report from Worknet LT on Time Line	Bimonthly	QA
2. Influence the Workforce Investment System				
a. Education	Report on Activity	Participate on the P-16 Council	Quarterly	PP&D
b. Economic Development/Castle Development	New Jobs Created Jobs Lost	Reports by MCEDCO, BEO and EDAC. Reports on Rapid Response activity	Quarterly	PP&D
c. Workforce Housing	# of New Units Built # of building permits issued for workforce housing	Support the WIB Policy on Workforce Housing	Yearly	Executive

Glossary

- BSU - Dept. of WI Business Services Unit**
- Executive - WIB Executive Committee**
- Finance - WIB Finance Committee**
- PP&D - WIB Program Planning & Development Committee**
- QA - WIB Quality Assurance Committee**
- YC - Youth Council**