

**Workforce Investment Board of Merced County  
Program Planning and Development Committee  
Dept of Workforce Investment – Large Conference Rm  
1880 W. Wardrobe Avenue, Merced, CA  
Wednesday, November 30, 2005, 3:00–4:30 p.m.  
Meeting Agenda**



[www.co.merced.ca.us/wi/wib/wib.html](http://www.co.merced.ca.us/wi/wib/wib.html)

- 
1. Call to Order and Roll Call .....
  2. Approve Agenda .....
  3. Approve Minutes (August 25, 2005) .....
  4. Public Opportunity to Speak .....
  5. Action Agenda .....
  - a. Eligible Training Provider List Policy ..... Alfredo Mendoza
  - b. Supportive Services Policy ..... Dave Davis
  6. Information Agenda .....
  - a. Frontline Workforce Development Grant Requirements .....
  - b. Medical Assistant Lattice Time Lines .....
  7. Chair Comments .....
  8. Next Meeting Date/Time—December 22, 2005, 3:00-4:30 p.m., Department of Workforce Investment, 1880 W. Wardrobe Ave/Large Conference Room .....
  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  
Dept of Workforce Investment – Large Conference Room  
1880 W. Wardrobe Ave, Merced, CA  
Thursday, August 25, 2005, 3:00 – 4:30 P.M.  
Meeting Minutes**



<http://web.co.merced.ca.us/wi/wib/subcommittees/subcommittees.html>

---

**Members Present:** Don Bergman, Sharon Cresswell, Ernie Flores, Phil Flores, Peter Fluetsch (Vice Chair), John Fowler, Al Romero, Mike Sullivan (Chair), Thomas Tsubota

**Members Absent:** Andrea Baker, Nicholas Benjamin, Scott Galbraith, Carol Greenberg, Anne Newins,

**Others Present:** Dave Cramer, Dave Davis, Debby Hoban, Sandy Lemas, Alfredo Mendoza, Bob Molmen, Joanne Presnell

---

**1. Call to Order and Roll Call:** The Chair called the meeting to order at 3:10 p.m. Roll call was taken.

**2. Agenda:** It was *M/S/C Flores/Fluetsch* to approve the agenda as published.

**3. Approve Minutes (July 28, 2005):** It was *M/S/C Fluetsch/Flores* to approve the July 28, 2005, minutes with amendment to add Don Bergman as an absent member.

**4. Public Opportunity to Speak:** None

**5. Action Agenda:**

**a. Self-Sufficiency Wage Waiver:** Staff noted the Workforce Investment Board (WIB) directed that the self-sufficiency wage be reassessed at least once a year. The Program Planning & Development Committee approved the limits for self-sufficiency at the last meeting. RN and LVN applicants were waived from the policy limits. Other individuals employed in Healthcare tend to fall outside of the policy limits and cannot receive our services.

It was *M/S/C Bergman/Fluetsch* that applicants who are employed within the Healthcare Industry cluster and are seeking upgrade services or other Healthcare employment will be exempt from this policy.

**b. Economic Development Action Team:** Economic Development is a key activity in the WIB's Implications for Action as published in the 2004 State of the Workforce. An implication for action that needs attention concerns "Ensure the complete implementation of the Merced County Economic Development Strategic Plan by reviewing status and recommending action."

Five (5) members of the Program Planning & Development Committee and WIB staff recently reviewed the action during an Economic Development "Brown Bag" meeting and felt the Strategic Plan should undergo an update and that the WIB would want to participate.

It was *M/S/C Bergman/Fluetsch* that the Program Planning & Development Committee reestablish its Economic Development Action Team with focus on working with key Economic Development organizations to review and update the status of the Merced County Economic Development Strategic Plan.

*"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."*

Don Bergman, Peter Fluetsch, and Phil Flores volunteered and Carol Greenberg was appointed to the Economic Development Action Team.

**c. Healthcare Forum:** During the July 28, 2005, meeting of the Program Planning & Development Committee, it was directed that planning begin on a Healthcare Forum. After a discussion, recommendation was made for staff to meet with Human Resources personnel from hospitals, health centers, and residential and skilled nursing centers. It was suggested specific questions be asked of the three different categories of healthcare, have them prioritize their concerns, and then have the results presented to the committee at the next meeting, or when available.

**6. Information/Discussion Agenda:**

**a. Update on Implications for Action:** Staff stated this item will be included in every committee to keep track of the three Implications for Action, and to keep the committees informed on what everyone is doing.

**7. Chair Comments:** The Chair requested the meeting date be changed to September 29, 2005, so members of the committee and staff could attend "*Frontline Workforce Development: Promoting Partnerships and Emerging Practices in Health and Health Care*" sponsored by the Robert Wood Johnson Foundation. The workshop is scheduled for September 22, 2005, in San Francisco.

**8. Next Meeting Date/Time:** The next meeting is September 29, 2005, 3:00-4:30 p.m., Department of Workforce Investment, 1880 W. Wardrobe Ave, Large Conference Room.

**9. Adjourn:** The meeting adjourned at 4:10 p.m.

Minutes prepared by Debby Hoban.

**TO: Program Planning and Development**

**DATE: 11/30/05**

**FROM: WIB Staff**

**For Action**

**For Information**

**For Discussion**

**SUBJECT: Eligible Training Provider's List (ETPL) Policy Revision**

**PROPOSED MOTION(S):** Accept the revised Eligible Training Providers List Policy and forward to the Workforce Investment Board for approval.

**DISCUSSION:** The State's requirements for inclusion on the ETPL have been reduced. The bulk of changes involve the State's elimination of Local Board criteria for programs to be placed the ETPL. The criteria for inclusion on the ETPL now rests with approval of the provider's program by Educational based organizations. A few such organizations are the Federal Department of Education, the California Department of Education, and the Chancellor's office of the California Community Colleges. Previously, the Local Board was allowed to place programs on the ETPL based on demonstrated program effectiveness, demonstration of sufficient evidence of employer support and willing to hire its graduates, and designation as an authorized training provider for industry-specific training.

**ATTACHMENT(S):** Updated ETPL Policy



**DEPARTMENT OF  
WORFORCE INVESTMENT**

**Policy/Procedure  
For**

**Eligible Training Provider's List (ETPL)**

**Andrea T. Baker**  
*Director*

Joanne Presnell  
*Assistant Director*

1880 W. Wardrobe Avenue  
Merced, CA 95340-6407  
(209) 724-2000  
(209) 725-3592 Fax  
[www.co.merced.ca.us/wi](http://www.co.merced.ca.us/wi)  
Equal Opportunity Employer

**Policy:** In accordance with the Workforce Investment Act of 1998, the Merced County Workforce Investment Board has approved the following policy. 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-termed follow-up and they must agree to abide by all WIA required regulations and/or laws.

The Merced County Workforce Investment Board has approved the following ETPL policies and procedures for the local area. These policies and procedures adhere to all state and federal requirements and have been adapted and structured to meet local needs.

As of July 1, 2000 all training providers wishing to access WIA funds must be on the State Eligible Training Providers List (ETPL). To be placed on the list, the training provider must submit an application to the Merced County Workforce Investment Board, hereinafter referred to as "Local Board" or "Board." The Board will accept all applications from organizations that intend to provide training services in the local area. Only those applications which meet all local and state criteria will be referred to the State for approval and listing on the ETPL.

**Procedures:**

I. Initial Application for ETPL Listing

A. Application to Board

1. The Board will accept applications on a continuing basis from providers who intend to provide training services in the local area (Merced County).
2. Board staff will review each application received to ensure it is filled out completely and in accordance with the Workforce Investment Act eligible training provider list forms handbook dated 4/2002.

B. Providers Eligible to Apply and Criteria for Initial Listing on ETPL

Providers must meet one of the following criteria in order to have their program listed on the ETPL:

1. Providers who are eligible to receive funds under the Higher Education Act of 1965 and whose programs lead to an associate or baccalaureate degree or a certificate must apply to a LWIB by completing an application and supply all of the required information, including any required by the Local Board;
2. Providers that carry out programs in California under the National Apprenticeship Act of August 16, 1937, and are approved by either the California Apprenticeship Council or the Bureau of Apprenticeship and Training must apply to a Local Board by completing an application and supply all of the required information, including any required by the Local Board;

3. Accreditation by an institution recognized by the Federal Department of Education;
4. Approval by the California Department of Education;
5. Approval by the Chancellor's office of the California Community Colleges;
6. Approval of the program by BPPVE;
7. Special registration of the program by BPPVE;

C. Approval of Registration by Bureau for Private Post-Secondary and Vocational Education (BPPVE).

1. A provider wishing to meet the criteria for initial listing by being either approved or specially registered by BPPVE must apply to BPPVE and satisfy BPPVE's approval or registration requirements before applying to the Local Board.
2. When the Local Board receives an application for a provider's initial listing on the ETPL and that provider is required to be registered with BPPVE in order to be eligible for ETPL listing, the Local Board must visit the site of the applicant's program and verify the registration information supplied to BPPVE before nominating the program to EDD. The site visit and data verification must be fully documented. To facilitate this process, the Local Board can obtain the provider's registration data from BPPVE, prior to the site visit.

II. Subsequent Eligibility Policy and Procedures

A. All programs that are initially listed on the ETPL must be determined, within 18 months of initial listing and annually thereafter, to be eligible to remain on the ETPL. This determination is called "subsequent eligibility."

B. Criteria for Subsequent Eligibility

1. In order to be subsequently eligible, programs must consider specific performance targets or levels on performance measures required under WIA:
  - a) Completion rates for all individuals in the listed program;
  - b) Percentage of all individuals participating in the listed program who obtain unsubsidized employment;
  - c) Wages at placement in employment of all individuals participating in the listed program;
  - d) Percentage of WIA participants who completed the listed program and were placed in unsubsidized employment;
  - e) Retention rates in unsubsidized employment of WIA participants who completed the listed program six-months after the first day of their employment;
  - f) Wages received by WIA participants who completed the listed program six-months after the first day of employment; and
  - g) Where appropriate, the rates of licensure or certification, attainment of academic degrees or equivalents, or attainment of other measures of skills, of the WIA participants who graduated from the listed program.
  - h) Costs to participate in the program.
2. Additional Requirements
  - a) The Local Board may establish any additional measures that it deems appropriate.
  - b) Before subsequent eligibility determination commences, the minimum performance targets, or levels, will be established by the Governor for each of the performance measures required by WIA. At their discretion, Local Board can set higher levels than the Governor. In addition, the Local Board can set levels for any additional measures than it determines to be appropriate.
  - c) In setting levels, the Local Board must take into consideration the following:

- (a) The specific economic, geographic, and demographic factors in the local areas in which providers seeking eligibility are located; and
- (b) The characteristics of the populations served by providers seeking eligibility, including the demonstrated difficulties in serving such populations, where applicable.
- d) In addition, providers must supply information on the costs for WIA participants to participate in the program.

C. Subsequent Eligibility Determination

1. Application to the Local Board

- a) Providers whose programs are subject to subsequent eligibility determination must reapply in order to be considered. For each unique program, a provider must apply to the Local Board.
- b) For any program offered at a physical site, the provider must apply to the Local Board where the site is located except when services are provided in multiple areas; the provider may submit an application to just one local board to provide services in all areas. Subsequently, each program will have a single sponsoring Local Board that will be responsible for subsequent eligibility determination, data flow, appeals, etc.
- c) The Local Board will accept applications for subsequent eligibility from providers who have been placed on the statewide list and who provide services within the local area. Board staff will determine that applications are complete and have the appropriate seed data required for subsequent eligibility.
- d) Applications for subsequent eligibility that meet all required criteria will be transmitted to EDD via the State JTA system.

III. Local Board Data Verification

A. The Local Board will be responsible for the following:

- 1. The Board will obtain updated information from the providers of programs listed through them.
- 2. The Board will inform EDD of any changes to the administrative, provider, or program data elements in order to keep the ETPL information current.
- 3. The Board will ensure that the data supplied by providers for either initial or subsequent eligibility is complete.
- 4. The Board will ensure that all One-Stop centers in their area have access to the most recent version of the ETPL and that it's readily available to all One-Stop customers.

B. Agreement With Providers

The Board will develop agreements with training providers nominated by the Board for listing on the ETPL that include provisions requiring providers to maintain records that are sufficient to support all provider data submissions for ETPL purposes and to make these records available for monitoring or audit by either the Board or the State.

IV. Denial, De-Listing Penalties, and Appeals

A. Denial of Application for Initial Listing

1. Reasons for Denial

- a) The Board may deny eligibility if the application from a provider is not complete or not submitted within required time frames.
- b) The Board must deny eligibility if an applicant fails to meet the minimum criteria for initial listing specified in (Section V. A.) of the State ETPL P&P.

- c) The Board may deny eligibility to a provider who has been found to have substantially violated any WIA requirements.
2. If the Board denies a provider's application for listing on the ETPL, the Board must, within 30 days of receipt of the application, inform the provider in writing and include the reason(s) for the denial and complete information on the appeal process.

#### B. De-listing of a Program on the ETPL

##### 1. Reasons for De-listing

- a) The Board may de-list a program if the provider fails to provide all the data required for subsequent eligibility determination within the required time frames.
  - b) The Board must de-list a program at any point at which it is determined that the program does not meet the minimum criteria for initial listing specified in (Section V. A. 3) of the State's ETPL P&P. For example, a program can be de-listed if its eligibility depended on accreditation, and the accreditation was lost.
  - c) The Board must de-list a program if, as a result of the subsequent eligibility determination process, the program is found not to have met the minimum levels of performance set by the State or by the Board.
  - d) The Board may de-list a program if the provider is found to have substantially violated any WIA requirements.
2. If the Board de-lists a program from the ETPL, the Board must, within ten days of its decision, inform the provider in writing and include the reason(s) for the denial and complete information on the appeals process.

#### C. Penalties

1. If EDD, in consultation with the Board, determines that a provider intentionally supplied inaccurate information for ETPL purposes, EDD shall terminate the eligibility of the provider to receive any funds under WIA Section 133 (b) for at least two years.
2. If the Board working with EDD determines that an eligible provider substantially violates any WIA requirements, EDD or the Board working with EDD may terminate the eligibility of the provider to receive any funds for a period of time under WIA Section 133 (b) or take other such action as EDD or the Board deems appropriate.

#### D. Appeals to the Board

1. This procedure applies only to appeals by training providers to the Local Board based on the denial of a provider's application for initial listing on the ETPL or the de-listing of a program already listed on the ETPL.
  - a) A provider wishing to appeal a decision by the Local Board must submit an appeal to the Local Board within thirty (30) days of the issuance of the denial notice. The appeal must be in writing and include a statement of the desire to appeal, specification of the program in question, the reason(s) for the appeal (i.e. grounds), and the signature of the appropriate provider official.
  - b) The first step in the Local Board appeals process must be an informal meeting between the Local Board staff and the appealing provider. The purpose of this meeting is to forestall the appeals process if there is an easy solution to the dispute.
  - c) The Local Board will offer the opportunity for appealing providers to have a hearing. The hearing officer shall be an impartial person. The hearing officer shall provide written notice to the concerned parties of the date, time and place of the hearing at

least ten (10) calendar days before the scheduled hearing. Both parties shall have the opportunity to present oral and written testimony under oath; to call and question witnesses; to present oral and written arguments; to request documents relevant to the issue(s); and to be represented.

The Local Board will notify a provider of its final decision on an appeal within sixty (60) days of receipt of the appeal. This period includes a hearing, if requested by the provider.

Local Board Contact:

Workforce Investment Board of Merced County  
1880 West Wardrobe Avenue  
Merced, CA 95340

Attention: Dave Davis  
Phone: (209) 724-2166  
Fax: (209) 725-3592

**Responsible Official:** Special Projects Manager

**Revised/Reviewed:** November 30, 2005

**TO: Program Planning and Development**

**DATE: 11/30/05**

**FROM: WIB Staff**

**For Action**

**For Information**

**For Discussion**

**SUBJECT: Supportive Services Policy**

**PROPOSED MOTION(S): Accept the new Supportive Services Policy and forward to the Workforce Investment Board for approval.**

**DISCUSSION: The Supportive Services Policy is in need of revision, largely because of rises in the costs of the services offered. The following are proposed revisions:**

- **Raise the amount available for participants enrolled in Core B/Intensive Services from \$150 to \$300. Revision adds an Employment and Retention Supportive Service payment after employment of \$50 at 90 days, \$50 at 180 days and \$50 at 270 days.**
- **Raises the amount for participants enrolled in a full time activity from \$1,500 to \$2,200.**
- **Changes the rate of transportation reimbursement. Delineates shorter trip rate (20-49 miles roundtrip) at \$5.00 per day from longer trips (50 miles plus) at \$10.00 per day.**
- **Raises the rate of reimbursement for childcare from \$15 to \$20 per day.**
- **Changes the verification of Pell Grant status from the College's Financial Aid Officer to the participant.**

**ATTACHMENT(S): Revised Supportive Services Policy**

# ***DRAFT***

## **Supportive Services**

Policy: Effective upon approval by the Executive Committee, participants may be provided supportive services using the criteria stated in this policy.

### **Section I – General Provisions**

The Merced County Workforce Investment Board (WIB), through the Merced County Department of Workforce Investment (WI), will make available supportive services to appropriate Workforce Investment Act (WIA) participants. All requests for participant supportive services and all collaborating information detailing the **need** will be documented in the Individual Employment Plan and/or in the participant's diary. To the best of its ability, the Department of Workforce Investment ensures that:

- Services provided under this policy are necessary to enable participants to participate in activities authorized under Title I of WIA;
- Services provided do not duplicate services available from other sources and are coordinated with the services and resources of the One-Stop partners and other community service partners.
- Financial assistance does not include post-exit services;
- Bonus and incentive payments, if provided are based on the attendance and performance by the participants receiving them;
- To the extent possible, similarly situated participants receive similar services;
- The Workforce Investment Area will meet applicable Internal Revenue Service and Fair Labor Standards Act requirements; and
- Needs-related supportive services are based on the program activity in which an individual is enrolled and the ongoing assessment related to the participant, such information to be documented in the Individual Employment Plan.
- Provisions of supportive services under this policy is contingent upon WIA funds available. Additionally, at the discretion of the Local WIB this Supportive Services Policy is subject to review and change.

Supportive services will be provided through a Flexible Benefit Account for each eligible participants. The Flexible Benefit Account is a maximum amount of dollars available to each eligible participant, based on the daily allowance for transportation and child care and/or the actual cost of other services provided, to offset any authorized supportive service needs for which the participant is eligible, as agreed to, and documented by, an Employment and Training Specialist. Each eligible participant may select how their allocation will be used to assist them during training and or job search activities. At no time, will a participant's use of any one service, or a combination of services, exceed the total amount of money available in his or her Flexible Benefit Account.

- Enrolled in Core B/Intensive Services- \$300 (\$150 Supportive Services Initial Employment; \$150 Employment & Retention Supportive Service payments \$50 at 90 days; \$50 at 180 days; \$50 at 270 days). Note: Employment at the same or a different employer does not need to be promotional).
- Enrolled in a full time activity (as defined by the training provider) - \$2200

## ***DRAFT***

(Note: this allowance may not be authorized for the LVN and RN programs at Merced College depending upon WIA funding.

- Enrolled in a full-time training activity with a training provider, not on the ETPL, known as a cross-referral. The amount will not exceed the actual costs associated with the training such as books, uniforms, supplies, fees such as health and parking but in no case will it exceed the maximum amount of \$1000 nor will it pay for such items as registration or tuition. A cross referral will also be eligible for the actual calculated costs for additional services such as child-care and transportation but in no case will it exceed the maximum of \$2200.

Exceptions may be made to this policy, on a case-by case basis, should individual circumstances warrant exception and are documented in the case diary by an Employment and Training Specialist.

### **Section 2- Supportive Services**

The Department of Workforce Investment, in accordance with the Workforce Investment Act and its implementing regulations, will provide supportive services deemed appropriate for payment or reimbursement to participants and/or other agencies or businesses for pre-approved necessary services, equipment and/or materials provided to the participant. Such services, equipment and/or materials may include, but are not limited to, the following:

- Transportation <sup>1</sup>
- Childcare<sup>2</sup>
- Employment/Retention Needs<sup>3</sup>
- DMV Printouts; Physicals;
- Tools; Uniforms/shoes/boots; Work clothes
- Immunizations;

---

<sup>1</sup> In County residents attending out-of county full –time training, and in-county residents with a round trip of 20-49 miles or 50 plus miles as verified by Map Quest or a similar website (including to and from childcare provide) to attend in-county full time training, are eligible to be reimburse (daily attendance will be verified by training provider). Rate of reimbursement varies 20 – 49 miles roundtrip \$5.00 per day; 50 plus miles roundtrip \$10 per day. Bus passes are available to those participants whose schedule and childcare arrangement can be accommodated by public transportation. Also, participants who are eligible to receive transportation allowance must provide proof of driver’s license, vehicle registration and insurance.

<sup>2</sup> Participants with a child 12 years of age or younger may be eligible for childcare. Participants with a child 13 through 18 years of age may be eligible for childcare the child is physically or mentally incapable of caring for him or herself, as determined by a legally qualified professional or who is under court supervision. If the participant’s spouse or significant other is neither working, looking for work nor in a training program and is not incapacitated or does not have special needs, childcare is not authorized. Participants qualifying for childcare will be reimbursed at the rate of **\$20.00** per day, regardless of the number of qualifying children. Documentation for reimbursement for childcare is the participant’s time and attendance for days in training, furnished by the training provider.

<sup>3</sup> A participant who has successfully completed their enrollment component and has entered full-time employment is eligible for a needs related supportive service of \$50. An additional \$50 may be provided at the end of the 1<sup>st</sup> and 2 quarter of employment to assist the participant in needs related to retaining their employment.

## ***DRAFT***

- Testing Cost, Fees, Licensing or endorsements;
- Application Fees; haircuts.

Needs-Related/Incidental Payments will not be authorized for this program year.

Participants who obtain unsubsidized employment may have their Supportive Services (Flexible Benefit Account) reduced or terminated. The participant's needs will be reassessed to determine if further assistance from WIA funding is required.

An Employment and Training Specialist, in collaboration with the participant, will develop a plan for services, equipment and/or materials that are typical for a participants' are of training, job search, and/or program activity.

### **Section 3-Pell Grants**

Participants enrolled or accepted for enrollment at an accredited college, in a course of study eligible for Federal or State financial aid and, leading to the award of a professional certificate, degree, etc., must apply for a Federal Pell Grant. No Supportive Services will be provided until this action is accomplished, as verified by a copy of the Pell Grant Application or award letter. An other grants, which the participant has applied for, must also be verified. Copies of the verification documents will be maintained in the participant's file.

Note: Preliminary Pell Grant eligibility can be established prior to enrollment into a training program. The Free Application for Federal Student Aid (FAFSA) form is used to determine eligibility and is available through the Internet or the financial-aid offices of accredited colleges. Applications can be submitted on-line through the One-Stop. One-Stop counselors will be familiar with the proper completion procedures for these forms and be able to assist customers in the filing process. Pell Grants are awarded only once in a program year, and only for one academic institution. The maximum amount for the Pell Grant will vary from year to year.

For WIA participants enrolled in the RN and LVN programs at Merced College, Supportive Services may be provided while a Pell Grant application is pending. Expenditures for Supportive Services will be tracked through the Department's fiscal client database.

Case managers will utilize their monthly contact with the participant to verify the status of the PELL Grant application. Note: Merced College publishes a Student Financial Aid Report that documents the status of Pell and other grant applications. The report also details the amounts and disposition of any grants awarded. These reports are provided to the One-Stop (Employment Resource Center) on a semester basis.

Upon award of a Pell Grant, full or partial, the participant's Supportive Services (Flexible Benefit Account) may be reduced or terminated. The participants "needs" will be

## ***DRAFT***

reassessed and documented to determine appropriate level of assistance from WIA funding.

### **Section 4 – ITA’s, Limitations of Financial Support**

For those customer who elect to attend occupation classroom training within the local labor market area (defined as from Fresno County to the South and Stanislaus County to the North), the maximum amount of funds available will be limited by the needs identified in the Individual Employment Plan and be consistent with the criteria put forth in this policy.

The Department of Workforce Investment will make no Supportive services available to participants who elect to attend occupational classroom training outside of the defined labor market area.

For those customers who must attend occupational classroom training outside the defined local labor market area because there are no providers of the training within the local area, the provisions set forth in this policy (electing to attend within the local labor market area) will apply.

**Procedure:** The Employment and Training Specialist will thoroughly interview each participant and ask appropriate questions relevant to the level of assistance the participant requires. The Employment and Training Specialist will prepare a plan of services that will be based on the individual’s need and what he/she is eligible for to successfully complete training. The Employment and Training Specialist in collaboration with the participant will prepare all supportive services obligations. Backup documentation is required in the file that will support the need for the supportive services and the exact amount and type of services(s) provided. For example:

When childcare is provided, the length and number of days of training, number of children, age(s), hours per day childcare is required and childcare provider need to be listed in the Individual Employment Plan/Diary.

When mileage is provided, there must be a copy of a map kept in the participant file from the Internet such as Mapquest, validating the mileage and that it is over 20 or 50 miles round trip per day commute. The participant will provide documentation that they have a valid CA Driver’s License and insurance with a copy in the participant file

Employment & Training Specialists will review the plan of services for the participant with their supervisor either individually or during a staffing session at which time verbal approval/denial/modification will be given by the supervisor (Manager). The E & T Specialist will complete the Customer Financial Form and send it electronically to MIS. A copy of the CCF will go to the Supervisor/Manager to be logged into the web-based obligations database used to manage funding resources in the various grants.

### **Procedure for Approving Exceptions to Supportive Service Limits**

## ***DRAFT***

Employment and Training Specialists will prepare the file to request an exception to the ITA or supportive services limits and present the file with all supporting documentation of need to the Supervising Employment Training Specialist/Manager for review and concurrence. Upon approval by the Program Manager the request will be sent forward to MIS with supporting documentation for processing according to the CFF. The Program Manager will review and ensure that funds are available prior to approval.

**TO: Program Planning and Development**

**DATE: 11/30/05**

**FROM: WIB Staff**

**For Action**

**For Information**

**For Discussion**

**SUBJECT: Frontline Workforce Development Grant Requirements**

**PROPOSED MOTION(S): Information Only**

**DISCUSSION: On 10/27/05 the Program Planning and Development Committee meeting formed a workgroup to discuss the Frontline Workforce Development information presented by WIB staff. Robert Wood Johnson Foundation (RWJ) uses a two-stage process to review all projects. The requirements needed for the first stage of the grant should be presented in a brief proposal (3 pages):**

- 1. A description of the key project components or activities.
  - a. An example would be to allow employees one half-day leave with pay for six months for college credit in healthcare field of study.****
- 2. An explanation of the core idea including the intended results.
  - a. Ideas could include addressing workers' needs in job security, job satisfaction, advancement opportunities, flexible educational opportunities and personal growth.**
  - b. Ideas could include addressing employers' needs in retention of workforce, recruitment from within organization, quick response to changes in technology and skill upgrade needs, improved quality of care and increased competitive edge in the marketplace.**
  - c. Ideas can address skill shortages, high turnover of direct-care workers, lack of diversity,****
- 3. An explanation of the intended audience and how results will be shared with the audience.**
- 4. A discussion of the relevance and significance of the problem or issue to be addressed including an explanation of the innovation that the project's core idea represents breakthroughs.**
- 5. A description of how the project might influence change in health and/or healthcare.**
- 6. The methodology that will be used in the evaluation project.**
- 7. An explanation of how success will be defined.**
- 8. Other funding sources identified for the project.**

**Once RWJ receives the (brief) grant application, they will perform a fair and comprehensive review.**

**ATTACHMENT(S): N/A**

**TO: Program Planning & Development**

**DATE: 11/30/05**

**FROM: WIB Staff**

**For Action**

**For Information**

**For Discussion**

**SUBJECT: Medical Assistant Career Lattice Project**

**PROPOSED MOTION (S): Information only.**

**DISCUSSION:** The Merced County Department of Workforce Investment (WI) has been awarded Governor's Discretionary funds to address issues related to training, retention and an educational lattice for Medical Assistants. WI has completed extensive research, data collection, and analysis for the Medical Assistant Career Lattice project. The groundwork has clearly been established and documented on the issues and challenges facing the medical assistants, employers and training providers. Career lattices are a recommended and proposed solution, but have not been fully developed for this field. The following events have occurred:

1. On 7/27/05, staff hosted a four-county action-planning meeting between Santa Cruz, San Mateo, Stanislaus and Merced County to discuss conducting a regional study that can be used both locally and statewide to address the feasibility of consistency in medical assistant training and building a lattice to the nursing program.
2. WI has completed a comparison of medical assistants from each of the four regional counties based on the 2005 California Labor Market Department surveys. The similarities between the counties were in the areas of job description, career options and sources available for additional information while the differences centered on working locations, salaries, benefits, and job outlook.
3. In September, WIB staff attended the Frontline Workforce Development: Promoting Partnerships and Emerging Practices in Health and Health Care workshop held in Foster City sponsored by the Robert Wood Johnson Foundation (RWJF). The workshop materials and related RWJF study have been posted on-line at [www.rwjf.org](http://www.rwjf.org) for review and grant funding options.
4. In October, a meeting was held with the Center of Public Policy Studies (CPPS) at California State University Stanislaus to discuss their assistance in conducting the medical assistant surveys. A proposal has been submitted by CPPS and has been reviewed for funding consideration. A meeting has been scheduled with WI and CPPS to further discuss the survey proposal and to negotiate a counter proposal.
5. The project management guidelines have been completed by Merced County with a work statement developed for each county to identify the steps in the project flow and process.
6. The time lines are to conduct the medical assistant surveys from January to June 2006, share the data with the county groups before the focus group sessions are conducted with the employers and training providers, and then conduct the focus groups by September 2006. The findings and recommend actions report will be completed by February 2007.

**ATTACHMENT (S): N/A**