



DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES

JULIE LYONS
DIRECTOR
ADMINISTRATIVE SERVICES

ANDI BERNARD
DIRECTOR
OC ANIMAL CARE

JULIA BIDWELL
DIRECTOR
OC HOUSING & COMMUNITY
DEVELOPMENT

RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES

TOM STARNES
DIRECTOR
OC PARKS


JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

Community Resources

September 7, 2022

To: WIOA and Other Subrecipients of the Orange County
Workforce Development Area

From: Carma Lacy
Director of Workforce Development

Subject: Conference, Meeting, Training, and Event Request Policy
Information Notice No. 22-OCWDB-04 

PURPOSE

The purpose of the Conference, Meeting, Training, and Event Request Policy is to have a process in place for Service Providers to request approval for attendance at public events, events/meetings hosted by elected officials, or other special engagements (conferences, meetings, trainings) in which Service Provider staff will be representing a County of Orange funded program.

EFFECTIVE DATE

This policy is effective immediately upon issuance.

POLICY AND PROCEDURES

Service Providers are to communicate the request regarding outreach events, meetings, trainings, conferences, including requests for the Service Provider to speak, present, and/or participate in a panel on behalf of the program, via email to their Program Manager for approval. OCWDB will conduct an internal evaluation of the request; requests may take up to 30 days to review.

To submit a request:

1. Submit the Request Form (Attachment I) at least 45 days prior to the event to the assigned Program Manager. If it is less than 45 days when notice is received of the event, the Request Form is to be sent ASAP. While completing the form, Service Provider will consider the operational needs of the event, in-house coverage in order to maximize staffing resources, program requirements, and relevance to core program duties.
2. Program Manager will review the request and adhere to the following review process:
 - Review submitted form and follow-up with Service Provider with any clarifying questions.
 - If Program Manager agrees with request, forward Request Form to Director of Workforce Development for approval.



WORKFORCE & ECONOMIC
DEVELOPMENT DIVISION
1300 SOUTH GRAND
BLDG. B, FIRST FLOOR
SANTA ANA, CA 92705
PHONE: 714.480.6500
FAX: 714.834-7132

When forwarding the form, the Program Manager will indicate in the subject line of the email the type of request (i.e. conference, meeting, training, speaker, etc.).

3. Upon review and approval/denial of request by Director of Workforce Development, Program Manager will email the Request Form back to the Service Provider.
4. Program Manager is to store a copy of the Request Form in the Service Provider's electronic file.

ACTION

Bring this policy to the attention of all staff and relevant parties.

ATTACHMENTS

Attachment I: Conference, Meeting, Training, and Event Request Form