A G E N D A

Orange County Workforce Development Board

May 24, 2023
8:30 AM
workforce.ocgov.com

Location:
1501 E. St. Andrew
Santa Ana, CA.

****In compliance with the Americans with Disabilities Act, those requiring accommodation for this meeting should notify the Orange County Community Services office 72 hours prior to the meeting at (714) 480-6500.**

The Board encourages your participation. If you wish to speak you may do so during Public Comment. Once acknowledged and prompted by the Chair, you may begin to speak. Except as otherwise provided by law, no action shall be taken on any item not appearing in the agenda. When addressing the Council, please state your name for the record prior to providing your comments.

This agenda contains a brief description of each item to be considered. Except as provided by law, no action shall be taken on any item not appearing in the agenda. To speak on a matter not appearing in the agenda, but under the jurisdiction of this Advisory Board, you may do so during Public Comments. Speaker request forms must be sent prior to the beginning of the meeting, the reading of the individual agenda items and/or the beginning of Public Comments. When addressing the Committee, it is requested that you state your name and city of residence for the record. Address the Committee as a whole through the Chair. Comments to individual Members or staff are not permitted. Speakers are limited to three (3) minutes.

Materials/handouts can be requested up to 72 hours in advance of the meeting by visiting https://www.occommunityservices.org/cid/oc-workforce-development-board.

This WIOA Title I financially assisted program or activity is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. TDD/TTY users, please call the California Relay Service (800) 735-2922 or 711. If you need special assistance to participate in this program, please contact 714-480-6500 at least 72 hours prior to the event to allow reasonable arrangements to be made to ensure program accessibility.

AGENDA:

1. CALL TO ORDER: Chair Teri Hollingsworth
2. PLEDGE OF ALLEGIANCE
3. BOARD MEMBER ROLL CALL: OC Community Services Representative
4. PUBLIC COMMENT:
   At this time, members of the public may address the Orange County Workforce Development Board regarding any items within the subject jurisdiction, provided that no action is taken on off-agenda items unless authorized by law. (Comments shall be limited to three (3) minutes maximum).

ACTION ITEM(S):

5. INVOICE POLICY
   Recommendation: Review and approve OCWDB Invoice Policy.

6. PROGRAM YEARS 2021-24 ORANGE COUNTY WORKFORCE DEVELOPMENT BOARD LOCAL PLAN AND ORANGE REGIONAL PLAN BIENNIAL MODIFICATIONS
   Recommendation: Review and approve the 2023 biennial modifications to the Program Year (PY) 2021-24 Orange County Workforce Development Board Local Plan and the Orange Regional Plan for submission to the Orange County Board of Supervisors.

PRESENTATION(S):

7. CALIFORNIA WORKFORCE ASSOCIATION(CWA): LOCAL WORKFORCE DEVELOPMENT BOARD ROLE, Bob Lanter, Executive Director, CWA

INFORMATION ITEM(S):

8. BUSINESS SERVICES COMMITTEE
9. YOUTH COMMITTEE
10. EDD COMPLIANCE / AUDIT UPDATES

DICSUSSION ITEM(S):

11. OPEN DISCUSSION
    At this time, members of this Committee may comment on agenda or non-agenda matters provided that NO action may be taken on off-agenda items unless authorized by law.

ADJOURNMENT

DISCLAIMER: No member of the Orange County Workforce Development Board (OCWDB) shall sign a letter or make a statement purported to represent the position of OCWDB as a body. Letters or verbal statements of support or opposition on any issue shall only be made or signed by the Chair of OCWDB and shall be submitted to the Board for approval. The policy of the Board of Supervisors does not allow OCWDB or its Chair to sign a letter of position on any matters pertaining to legislation. OCWDB members may write personal letters or speak as individuals stating personal positions but may not do so as representing the position or opinion of OCWDB.

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

PAMELA PASSOW
INTERIM DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

OC Community Resources

May 24, 2023

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

From: Renee Ramirez
Director of Orange County Community Services

Subject: Invoice Review Policy
Information Notice No. 23-OCWDB-03

PURPOSE

To provide guidance to Service Providers on submitted invoices to the County of Orange.

EFFECTIVE DATE

This policy is effective immediately upon issuance.

REFERENCES

- WIOA Public Law 113-128
- Title 2 Code of Federal Regulations (CFR) Part 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)
- Title 2 CFR Part 2900: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Department of Labor [DOL] Exceptions)
- WSD18-10 *WIOA Training Expenditure Requirement* (January 31, 2019)
- WSD16-16 *Allowable Costs and Prior Written Approval* (February 21, 2017)

BACKGROUND

OMB 2 CFR 200 Uniform Guidance: Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) and Workforce Investment and Opportunity Act (WIOA) states that to be an allowable charge, a cost must meet the following criteria:

- Be necessary and reasonable for the performance of the award.
- Be allocable to the award.
- Conform to any limitations or exclusions set forth in the award.
- Be consistent with policies and procedures that apply uniformly to all activities and personnel without the organization, regardless of funding source.

OC WORKFORCE & ECONOMIC DEVELOPMENT

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

- Conforms to any limitations or exclusions of cost item types or amounts, as set forth in the Uniform Guidance, federal law, federal award, or other governing regulations.
- Be accorded consistent treatment.
- Be determined in accordance with generally accepted accounting principles.
- Not be used to meet cost sharing or matching requirements of any other federally financed program (without prior approval from the County and EDD).
- Be adequately documented.

Policy and Procedures

Payment requests must reflect only allowable program costs that were incurred and paid within the period of performance for the award and are included in the approved detailed contract budget.

Written prior approval from EDD (Attachment I) is required for equipment purchases and related services under the following criteria:

- Procurements with a per-unit cost that exceeds $5,000.
- Related procurements with cumulative costs that exceed $5,000 within the same state fiscal year.
- Procurements resulting in improvements to land, buildings, or equipment which exceed $5,000.

Appropriate Forms of Transaction Documentation

To be reimbursed for allowable expenses, Service Providers must provide supporting documentation showing that costs were both incurred and paid. The principal form of documentation will be an itemized receipt from the vendor detailing the purchase(s) made, the date of transaction, the amount and the method of payment.

If a receipt is not available, a copy proof of payment or other document supporting that the transaction was executed; e.g., bank statement, electronic reference, etc.. The Invoice Cost Category section has further details for each type of expense. Reimbursement of wages and fringe benefits must be based on records that accurately reflect the work performed (See Personnel Salaries). If payments do not complete the clearing cycle within 90 days of issuing the payment, the Service Provide will issue a supplemental invoice for the month that the payment was claimed removing the payment and return the balance to the County.

Submission of a credit card statement is not sufficient documentation of an incurred and paid cost unless supporting documentation such as a contract, purchase receipt or invoice and a subsequent statement verifying the account balance was paid in full no later than 90 days after the period of performance end date is included. If the credit card account carries a balance, only the pro-rated portion of the expenditure in relation to the outstanding balance will be allowed. For example: A performance fee of $2,000 was charged to a credit card. The next statement shows a payment in the amount of $5,000 on an outstanding balance of $20,000. Therefore, only $500 can be submitted for reimbursement.

$5,000 / $20,000 = .25
.25 x $2,000 = **$500.00**

Invoice Cost Categories

1. Personnel Salaries – List all staff positions by title. State the percentage of each staff member's time devoted to the program/project, the amount of each staff member's salary funded by the grant and the total personnel cost for the period of performance.

   OMB Uniform Guidance 2 CFR 200.430 (i) (1) Standard of Documentation of Personnel Expenses requires salary and wage expenses to be based on records that accurately reflect the work performed. The records must be supported by a system of internal controls which provide reasonable assurances that the changes are accurate, allowable, properly allocated, and reflect the total activity for which the employee is compensated.

   The invoice should indicate the total amount of wages and fringe benefits, the net amount of the paycheck, and the amount of wages and fringe benefits applicable to the program (grant). The percentage of time each individual budgeted to the specific OCWDB project (grant) for which reimbursement is requested must be easily identifiable.

   OCWDB reserves the right to require Personnel Activity Reports or equivalent documentation to determine that salary and fringe charges are pro-rated to reflect only the allowable amount.

Required Documentation for Cost Reimbursement Invoice Submission Service Provider is required to submit the following approved forms of documentation to support cost reimbursement: • General Ledger/expense transaction report, paycheck stubs, or third-party payroll report • Payroll register or labor distribution report • Payroll allocation plan • Personnel Documentation • Itemized receipts

2. Fringe Benefits - State the amount of each staff member's benefits funded by the grant and the total personnel cost for the period of performance.

Required Documentation for Cost Reimbursement Invoice Submission Service Provider is required to submit the following approved forms of documentation to support cost reimbursement: • General Ledger, paycheck stubs, or third-party payroll reports • Benefit plan and calculation of benefit • Employer-employee contract for non-customary benefits (if applicable) • Itemized receipts

3. Travel –Travel costs must be related to the program or an EDD requirement. Toll road expenses are not permitted.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:

- Mileage Log (Date, employee name, purpose of travel, total amount of miles and reimbursement rate) *must use current IRS approved rates.
- MapQuest, Google Map, etc. printouts documenting mileage amount
- Itemized Receipts/Invoice
- Proof of payment/cleared check

4. Equipment – Identify each item of equipment purchased. Equipment is tangible personal property (including information technology systems) that have an acquisition cost of $5,000 or more per unit and a useful lifetime of more than one year. The following equipment purchases require pre-approval from EDD (Attachment I):
    - Procurements with a per-unit cost that exceeds $5,000
    - Related procurements with cumulative costs that exceed $5,000 within the same state fiscal year. Procurements under $5,000 (for a set of similar or connected goods) which have additional or unexpected charges within the same 12-month period which causes the total cumulative cost to exceed $5,000 can be submitted for Retroactive Approval through the prior approval process. The Retroactive Approval should be requested before the cumulative charges exceed $5,000.
    - Procurements resulting in improvements to land, buildings, or equipment which exceed $5,000

    List the quantity and unit cost per item. Items with a unit cost of less than $5,000 are supplies.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit no less than one of the following approved forms of documentation to support cost reimbursement:

- Itemized Receipts/Invoice
- Proof of payment
- EDD approval form
- Procurement documentation

5. Supplies – Supplies include all tangible personal property other than “equipment.” A computing device is a supply if the acquisition cost is less than $5,000 regardless of the length of its useful life.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:

- Itemized Receipt/Invoice
- Proof of payment/cleared check

6. Contractual – For each proposed contract and subaward, specify the purpose, activities, and estimated cost. Per the Service Provider contracts, all subcontracts must be pre-approved by OCCS. Any expenses incurred by a subcontractor that has not been approved may be disallowed. Under the Contractual line item, delineate contracts and subawards separately. Contracts are defined according to 2 CFR 200.22 as a legal instrument by which a non-Federal entity purchases property or services needed to carry out the project or program under a Federal award. A subaward, defined by 2 CFR 200.92, is an award provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program.

Required Documentation for Cost Reimbursement Invoice Submission Service Provider is required to submit the following approved forms of documentation to support cost reimbursement: • Purchase Order • Itemized Receipt/Invoice • Proof of Payment/cleared check

7. Other – Each item should be listed with sufficient detail to illustrate that the costs are reasonable or allowable.

    - **Program Rent/ Infrastructure –** Service Providers must request approval in writing from OCWDB before entering into any lease and/or infrastructure related agreements and provide copies once agreements are executed.

    -

Required Documentation for Cost Reimbursement Invoice Submission Service Provider is required to submit no less than one of the following approved forms of documentation to support cost reimbursement: • Itemized receipts/Invoice • Proof of payment/cleared check

    - **Participant Tuition Payments/ Vouchers/ Individual Training Accounts (ITA) -**. Each participant invoiced is to be listed on the “Other Costs” tab of the invoice.

Required Documentation for Cost Reimbursement Invoice Submission Service Provider is required to submit the following approved forms of documentation to support cost reimbursement: • Itemized receipts/invoice • Proof of payment • Approved ITA Authorization and Voucher

- **On-The-Job Training (OJT) –** Each participant invoiced is to be listed on the "Other Costs" tab of the invoice. No holiday, vacation, or overtime pay is allowed under an OJT.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- General Ledger, paycheck stubs, or third-party payroll report
- Proof of payment
- OJT agreement

- **Participant Stipends** – Each participant invoiced is to be listed on the "Other Costs" tab of the invoice.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- Itemized receipts/Invoice
- Proof of payment
- Stipend log/attendance log per person and reflective only of the month being invoiced

- **Participant Supportive Services** – Each participant invoiced is to be listed on the "Other Costs" tab of the invoice.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- Itemized Receipts/Invoice
- Proof of payment
- Supportive Services Request Form
- Supportive Services Exploration Form
- Supportive Services Participant Log

- **Participant Work Experience –** Each participant invoiced is to be listed on the "Other Costs" tab of the invoice.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- General Ledger, paycheck stubs, or third-party payroll reports
- Proof of payment/cleared check
- Worksite agreement

8. **Administrative/Indirect Charges** – Indirect charges shall be no more than 10% of funds awarded under the grant. Indirect costs are costs or expenses not directly related to the deliverance of the contracted services (i.e. off-site supervisors, managers, CEO etc.).

Invoice Submission Procedures

1. Invoices are due from Service Providers by the 10th day of the month, unless approved for another frequency.
2. Service Providers have the option to use a secured file sharing system, such as DropBox, Google Drive, or OneDrive, or to direct email to submit their monthly invoice.
3. Once an invoice with back-up documentation is ready for submission, Service Provider is to email the link (DropBox, Google Drive, OneDrive, etc) for the invoice or email the complete pdf file to their assigned Grant Manager/Administrator, the OCCR Accounting Technician, and the current invoice email address.
4. A mailed, signed hard copy must also be submitted according to the contract language. OCCR Accounting will date stamp the hard copy invoice upon receipt from the Service Provider.
5. Program staff and Accounting staff will review the invoice concurrently.
6. If discrepancies exist with the invoice, OCCR Accounting will email the Service Provider requesting a revised invoice.
7. The 45-day invoice review cycle will re-start once a revised invoice is submitted by the Service Provider.
8. Once reviewed and all approvals obtained, invoice is processed for payment.

Leverage

The Training Expenditure Leveraged Resources Tracking Workbook (Attachment II) is used by the Service Provider to calculate and track leveraged resources that can be applied to a maximum of 10% of the required training expenditures. This workbook must be filled out on a monthly basis and maintained throughout the program year. One workbook per applicable WIOA Program. In addition, Service Providers must complete the Quarterly Training Expenditure Leveraged Resources Form and submit it to their Grants & Program Administrator in pdf format on the 10th day of the month following each reporting quarter.

Final Invoices/Fiscal Year or Grant Closeout

The County and EDD deadline to close out the programs and finances is 60 days after close of grant/fiscal year. It is imperative that Service Providers submit the required closeout documents and June/final month invoice (and any outstanding invoices) in a timely manner to allow for review and approval. The EDD closeout report documents must be completed and returned within 30 days. Any changes to final/approved monthly invoices that are not reflected in the Services Providers' initial submitted financial closeout forms must be revised and resubmitted by the Service Provider.

ACTION

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

INQUIRIES

If you have any questions regarding this policy, please contact your Contract Administrator at 714-480-6500.

ATTACHMENTS

Attachment I: Procurement/Purchase Approval Request Form
Attachment II: Training Expenditure Leveraged Resources Tracking Workbook

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

PAMELA PASSOW
INTERIM DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

~~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~~

OC Community Resources

~~March 4, 2022~~May 24, 2023

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

From: ~~Carma Lacy~~Renee Ramirez
Director of ~~Workforce Development~~Orange County Community Services

Subject: Invoice Review Policy
Information Notice No. ~~22-OCWDB-02~~23-OCWDB-03

PURPOSE

To provide guidance to Service Providers on submitted invoices to the County of Orange.

EFFECTIVE DATE

This policy is effective immediately upon issuance.

REFERENCES

- WIOA Public Law 113-128
- Title 2 Code of Federal Regulations (CFR) Part 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)
- Title 2 CFR Part 2900: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Department of Labor [DOL] Exceptions)
- WSD18-10 *WIOA Training Expenditure Requirement* (January 31, 2019)
- WSD16-16 *Allowable Costs and Prior Written Approval* (February 21, 2017)

BACKGROUND

OMB 2 CFR 200 Uniform Guidance: Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) and Workforce Investment and Opportunity Act (WIOA) states that to be an allowable charge, a cost must meet the following criteria:

- Be necessary and reasonable for the performance of the award.
- Be allocable to the award.
- Conform to any limitations or exclusions set forth in the award.
- Be consistent with policies and procedures that apply uniformly to all activities and personnel without the organization, regardless of funding source.

- Conforms to any limitations or exclusions of cost item types or amounts, as set forth in the Uniform Guidance, federal law, federal award, or other governing regulations.
- Be accorded consistent treatment.
- Be determined in accordance with generally accepted accounting principles.
- Not be used to meet cost sharing or matching requirements of any other federally financed program (without prior approval from the County and EDD).
- Be adequately documented.

Policy and Procedures

Payment requests must reflect only allowable program costs that were incurred and paid within the period of performance for the award and are included in the approved detailed contract budget.

Written prior approval from EDD (Attachment I) is required for equipment purchases and related services under the following criteria:

- Procurements with a per-unit cost that exceeds $5,000.
- Related procurements with cumulative costs that exceed $5,000 within the same state fiscal year.
- Procurements resulting in improvements to land, buildings, or equipment which exceed $5,000.

Appropriate Forms of Transaction Documentation

To be reimbursed for allowable expenses, Service Providers must provide supporting documentation showing that costs were both incurred and paid. The principal form of documentation will be an itemized receipt from the vendor detailing the purchase(s) made, the date of transaction, the amount and the method of payment.

If a receipt is not available, a copy ~~of a cancelled check/electronic copy~~proof of payment or other document supporting that the transaction was executed; e.g., bank statement, electronic reference, etc. ~~All copies of cancelled checks submitted should include both the front and back of the check. If the back side is not available, a copy of the respective bank statement or online statements can be substituted~~. The Invoice Cost Category section has further details for each type of expense. Reimbursement of wages and fringe benefits must be based on records that accurately reflect the work performed ~~.~~ (See Personnel Salaries). If payments do not complete the clearing cycle within 90 days of issuing the payment, the Service Provide will issue a supplemental invoice for the month that the payment was claimed removing the payment and return the balance to the County.

Submission of a credit card statement is not sufficient documentation of an incurred and paid cost unless supporting documentation such as a contract, purchase receipt or invoice and a subsequent statement verifying the account balance was paid in full no later than 90 days after the period of performance end date is included. If the credit card account carries a balance, only the pro-rated portion of the expenditure in relation to the outstanding balance will be allowed. For example: A performance fee of $2,000 was charged to a credit card. The next statement shows a payment in the amount of $5,000 on an outstanding balance of $20,000. Therefore, only $500 can be submitted for reimbursement.

$5,000 / $20,000 = .25

.25 x $2,000 = **$500.00**

Invoice Cost Categories

1. Personnel Salaries – List all staff positions by title. State the percentage of each staff member's time devoted to the program/project, the amount of each staff member's salary funded by the grant and the total personnel cost for the period of performance.

   OMB Uniform Guidance 2 CFR 200.430 (i) (1) Standard of Documentation of Personnel Expenses requires salary and wage expenses to be based on records that accurately reflect the work performed. The records must be supported by a system of internal controls which provide reasonable assurances that the changes are accurate, allowable, properly allocated, and reflect the total activity for which the employee is compensated.

   The invoice should indicate the total amount of wages and fringe benefits, the net amount of the paycheck, and the amount of wages and fringe benefits applicable to the program (grant). The percentage of time each individual budgeted to the specific OCWDB project (grant) for which reimbursement is requested must be easily identifiable.

   OCWDB reserves the right to require Personnel Activity Reports or equivalent documentation to determine that salary and fringe charges are pro-rated to reflect only the allowable amount.

Required Documentation for Cost Reimbursement Invoice Submission Service Provider is required to submit the following approved forms of documentation to support cost reimbursement: • General Ledger/expense transaction report, paycheck stubs, or third-party payroll report • Payroll register or labor distribution report • Payroll allocation plan • Personnel Documentation • Itemized receipts

2. Fringe Benefits - State the amount of each staff member's benefits funded by the grant and the total personnel cost for the period of performance.

Required Documentation for Cost Reimbursement Invoice Submission Service Provider is required to submit the following approved forms of documentation to support cost reimbursement: • General Ledger, paycheck stubs, or third-party payroll reports • Benefit plan and calculation of benefit • Employer-employee contract for non-customary benefits (if applicable) • Itemized receipts

3. Travel –Travel costs must be related to the program or an EDD requirement. Toll road expenses are not permitted.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement: • Mileage Log (Date, employee name, purpose of travel, total amount of miles and reimbursement rate) *must use current IRS approved rates. • MapQuest, Google Map, etc. printouts documenting mileage amount • Itemized Receipts/Invoice • Proof of payment/cleared check

4. Equipment – Identify each item of equipment purchased. Equipment is tangible personal property (including information technology systems) that have an acquisition cost of $5,000 or more per unit and a useful lifetime of more than one year. The following equipment purchases require pre-approval from EDD (Attachment I):
    - Procurements with a per-unit cost that exceeds $5,000
    - Related procurements with cumulative costs that exceed $5,000 within the same state fiscal year. Procurements under $5,000 (for a set of similar or connected goods) which have additional or unexpected charges within the same 12-month period which causes the total cumulative cost to exceed $5,000 can be submitted for Retroactive Approval through the prior approval process. The Retroactive Approval should be requested before the cumulative charges exceed $5,000.
    - Procurements resulting in improvements to land, buildings, or equipment which exceed $5,000

    List the quantity and unit cost per item. Items with a unit cost of less than $5,000 are supplies.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit no less than one of the following approved forms of documentation to support cost reimbursement: • Itemized Receipts/Invoice • Proof of payment~~/cleared check~~ • EDD approval form • Procurement documentation

5. Supplies – Supplies include all tangible personal property other than “equipment.” A computing device is a supply if the acquisition cost is less than $5,000 regardless of the length of its useful life.

Required Documentation for Cost Reimbursement Invoice Submission

Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- Itemized Receipt/Invoice
- Proof of payment/cleared check

6. Contractual – For each proposed contract and subaward, specify the purpose, activities, and estimated cost. Per the Service Provider contracts, all subcontracts must be pre-approved by OCCS. Any expenses incurred by a subcontractor that has not been approved may be disallowed. Under the Contractual line item, delineate contracts and subawards separately. Contracts are defined according to 2 CFR 200.22 as a legal instrument by which a non-Federal entity purchases property or services needed to carry out the project or program under a Federal award. A subaward, defined by 2 CFR 200.92, is an award provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- Purchase Order
- Itemized Receipt/Invoice
- Proof of Payment/cleared check

7. Other – Each item should be listed with sufficient detail to illustrate that the costs are reasonable or allowable.

    - **Program Rent/ Infrastructure –** Service Providers must request approval in writing from OCWDB before entering into any lease and/or infrastructure related agreements and provide copies once agreements are executed.

    -

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit no less than one of the following approved forms of documentation to support cost reimbursement:
- Itemized receipts/Invoice
- Proof of payment/cleared check

    - **Participant Tuition Payments/ Vouchers/ Individual Training Accounts (ITA) -**. Each participant invoiced is to be listed on the “Other Costs” tab of the invoice.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- Itemized receipts/invoice

- Proof of payment~~/cleared check~~
- Approved ITA Authorization and Voucher

- **On-The-Job Training (OJT) –** Each participant invoiced is to be listed on the "Other Costs" tab of the invoice. No holiday, vacation, or overtime pay is allowed under an OJT.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- General Ledger, paycheck stubs, or third-party payroll report
- Proof of payment~~/cleared check~~
- OJT agreement

- **Participant Stipends** – Each participant invoiced is to be listed on the "Other Costs" tab of the invoice.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- Itemized receipts/Invoice
- Proof of payment
- Stipend log/attendance log per person and reflective only of the month being invoiced

- **Participant Supportive Services** – Each participant invoiced is to be listed on the "Other Costs" tab of the invoice.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:
- Itemized Receipts/Invoice
- Proof of payment~~/cleared check~~
- Supportive Services Request Form
- Supportive Services Exploration Form
- Supportive Services Participant Log

- **Participant Work Experience –** Each participant invoiced is to be listed on the "Other Costs" tab of the invoice.

Required Documentation for Cost Reimbursement Invoice Submission
Service Provider is required to submit the following approved forms of documentation to support cost reimbursement:

- General Ledger, paycheck stubs, or third-party payroll reports
- Proof of payment/cleared check
- Worksite agreement

8. **Administrative/Indirect Charges** – Indirect charges shall be no more than 10% of funds awarded under the grant. Indirect costs are costs or expenses not directly related to the deliverance of the contracted services (i.e. off-site supervisors, managers, CEO etc.).

Invoice Submission Procedures

1. Invoices are due from Service Providers by the 10th day of the month, unless approved for another frequency.
2. Service Providers have the option to use a secured file sharing system, such as DropBox, Google Drive, or OneDrive, or to direct email to submit their monthly invoice.
3. Once an invoice with back-up documentation is ready for submission, Service Provider is to email the link (DropBox, Google Drive, OneDrive, etc) for the invoice or email the complete pdf file to their assigned Grant Manager/Administrator, the OCCR Accounting Technician, and the current invoice email address.
4. A mailed, signed hard copy must also be submitted according to the contract language. OCCR Accounting will date stamp the hard copy invoice upon receipt from the Service Provider.
5. Program staff and Accounting staff will review the invoice concurrently.
6. If discrepancies exist with the invoice, OCCR Accounting will email the Service Provider requesting a revised invoice.
7. The 45-day invoice review cycle will re-start once a revised invoice is submitted by the Service Provider.
8. Once reviewed and all approvals obtained, invoice is processed for payment.

Leverage

The Training Expenditure Leveraged Resources Tracking Workbook (Attachment II) is used by the Service Provider to calculate and track leveraged resources that can be applied to a maximum of 10% of the required training expenditures. This workbook must be filled out on a monthly basis and maintained throughout the program year. One workbook per applicable WIOA Program. In addition, Service Providers must complete the Quarterly Training Expenditure Leveraged Resources Form and submit it to their Grants & Program Administrator in pdf format on the 10th day of the month following each reporting quarter.

Final Invoices/Fiscal Year or Grant Closeout

The County and EDD deadline to close out the programs and finances is 60 days after close of grant/fiscal year. It is imperative that Service Providers submit the required closeout documents and June/final month invoice (and any outstanding invoices) in a timely manner to allow for review and approval. The EDD closeout report documents must be completed and returned within 30 days. Any changes to final/approved monthly invoices that are not reflected

in the Services Providers' initial submitted financial closeout forms must be revised and resubmitted by the Service Provider.

ACTION

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

INQUIRIES

If you have any questions regarding this policy, please contact your Contract Administrator at 714-480-6500.

ATTACHMENTS

Attachment I: Procurement/Purchase Approval Request Form
Attachment II: Training Expenditure Leveraged Resources Tracking Workbook

2023 Biennial Modifications to the PY 2021-24 Orange County WDB Local Plan and the Orange RPU Regional Plan

Presentation to the Orange County WDB

March 24, 2023

WIOA-Required Plans

- State and local plans have been required for 40 years under federal workforce development programs. Under the Workforce Innovation and Opportunity Act (WIOA), regional plans are also required.
- The WIOA statute and its implementing regulations prescribe the content of the plans, but states may add additional requirements for the regional and local plans.
- In California, the State Employment Development Department (EDD) and California Workforce Development Board (CWDB) issue joint guidance for regional and local plans.
- Acting on behalf of the Governor, EDD and CWDB review and approve regional and local plans.

Purpose and Key Content of the Three Plans

State Plan

- The State Plan provides the framework to outline a strategic vision of, and goals for, how their workforce development systems will achieve the purposes of WIOA. It serves as a four-year action plan to develop, align, and integrate state systems and provide a platform to achieve the state's vision and strategic and operational goals.

- The State Plan also directs investments in economic, education, and workforce training programs to focus on providing relevant education and training to ensure that workers have the skills to compete in the job market and that employers have a ready supply of skilled workers.

Regional Plan

- The Regional Plan is a four-year action plan to develop, align and integrate service delivery strategies and resources among the multiple local workforce development areas in a region. The Regional Plan must be consistent with the vision and goals of the State Plan.

- The Regional Plan represents the big picture of a region's economy and workforce environment with a focus on collaborative strategies to be implemented across multiple local areas to attain regional goals and objectives.

Local Plan

- The Local Plan is a four-year action plan to develop, align and integrate service delivery strategies and resources among the *six WIOA core programs and partners* in a specific local area. The Local Plan should support achievement of the State's vision and goals, as outlined in the State Plan.

- The Local Plans within a region support and align with the Regional Plan, and Local Plans must be incorporated as a part of the Regional Plan. WIOA requires that both local and regional plans align with the State Plan.

Period Covered by the Plans

- All WIOA Plans Cover a Four-Year Planning Period
- The cycle for the State Plan is one year ahead of the cycle for Regional and Local Plans.
- Biennial modifications to all plans are required. These modifications go into effect at the mid-point of the four-year period and provide updates to ensure that plans remain current.

Plans Pertaining to the Orange County Workforce System

- ✓ Among the 15 workforce regions established in California, the three Orange County-based workforce development boards (City of Anaheim, City of Santa Ana, and County of Orange) comprise the Orange Regional Planning Unit (RPU). The RPU must develop the Regional Plan.

- ✓ While local plans are typically written on behalf of one local board, the three WDBs in Orange County have received permission to submit a joint Local Plan.

Since the implementation of WIOA, the following **plans** connected to the Orange County workforce system have been approved by EDD and the CWDB:

- PY 2017-20 Orange RPU Regional Plan (inactive)
- 2019 Biennial Modification to the PY 2017-20 Orange RPU Regional Plan (inactive)
- PY 2021-24 Orange RPU Regional Plan (active)
- **2023 Biennial Modification to the PY 2021-24 Orange RPU Regional Plan** *(pending approval and awaiting signatures from the WDB Chair and the County Board of Supervisors)*

- PY 2017-20 Orange County Unified Local Plan (inactive)
- 2019 Biennial Modification to the PY 2017-20 Orange County Unified Local Plan (inactive)
- PY 2021-24 Orange County Unified Local Plan (active)
- **2023 Biennial Modification to the PY 2021-24 Orange County Unified Local Plan** *(pending approval and awaiting signatures from the WDB Chair and the County Board of Supervisors)*

Required Content of the Regional Plan

- Analytical Overview of the Region (Workforce and Economic Analysis)
- Regional Indicators
- Fostering Demand-Driven Skills Attainment
- Enabling Upward Mobility for All Californians
- Aligning, Coordinating, and Integrating Programs and Services

Required Content of the Local Plan

- WIOA Core and Required Partner Coordination (19 federal programs)
- State Strategic Partner Coordination (4 state programs/priorities)
- WIOA Title I Coordination (Service delivery for adults and youth, along with dislocated workers; and staff development strategies)

Developing the Regional and Local Plan Modifications

Key processes and strategies for developing the 2023 modifications to the two plans included:

- A two-day in-person planning session during which WDB members, WDB management and staff, and workforce system partners met to review the PY 2021-24 Regional and Local Plans and identify where content updates should be made
- An in-person community forum addressing key issues pertinent to the Regional Plan
- An in-person community forum addressing key issues pertinent to the Local Plan
- Publication of draft versions of the plans under a 30-day public comment period
- Presentation to the WDBs and their Chief Elected Officials seeking approval and signature

Overview of 2023 Modified Content to the Orange RPU PY 2021-24 Regional Plan

- Included an introduction section to make the plan more accessible and easier to understand for a wide audience.
- Updated data concerning the regional economy and demographics, utilizing resources from EDD's Labor Market Information Division, the U.S. Census Bureau, and other organizations.
- Selected a Regional Indicator (qualitative metric): *The region has a process to communicate industry workforce needs to supply-side partners.*
- Described the new Orange Workforce Alliance branding representing regional efforts.
- Described work with businesses in target sectors and growth/priority industries.
- Included recommendations obtained from partners and through community input.
- Throughout the document, updated facts and figures.
- Throughout the document, revised descriptions to ensure that they suitable for a broad audience.

Overview of 2023 Modified Content to the Orange RPU PY 2021-24 Local Plan

- Included an introduction section to make the plan more accessible and easier to understand for a wide audience.
- Updated the list of WIOA mandated partners to reflect changes.
- Included a section on local partnerships with organized labor, business service agencies, and community organizations.
- Updated information on relationships with state strategic partner programs.
- Describe initiatives and training to increase staff knowledge and effectiveness.
- Updated information regarding the AJCCs managed by the three WDBs, along with other forms of service delivery, including web-based services and the availability of a mobile unit.
- Included recommendations obtained from partners and community input.
- Throughout the document, updated facts and figures, and described the impact of the pandemic on service delivery and how recovery is occurring.
- Throughout the document, revised descriptions to ensure that they suitable for a broad audience.

Thank you!

Questions?

2023 BIENNIAL
MODIFICATION TO THE

REGIONAL PLAN

Program Year 2021-2024

ORANGE REGIONAL PLANNING UNIT

ORANGE
WORKFORCE
ALLIANCE

AWDB ANAHEIM WORKFORCE DEVELOPMENT BOARD

OC WORKFORCE DEVELOPMENT BOARD
Overseeing job seekers, youth and business programs and services.

SANTA ANA WORKFORCE DEVELOPMENT BOARD

Orange Regional Planning Unit
Contact: Annette Kelly-Whittle, Regional Organizer
Phone: (909) 362-7082
Email: Annette.whittle@orangeworkforcealliance.com

Anaheim Workforce Development Board
Contact: Marco Lucero
Phone: (714) 765-4341
Email: mlucero@anaheim.net

Orange County Workforce Development Board
Contact: Carma Lacy
Phone: (714) 480-6420
Email: carma.lacy@occr.ocgov.com

Santa Ana Workforce Development Board
Contact: Deborah Sanchez
Phone: (714) 565-2621
Email: dsanchez@santa-ana.org

TABLE OF CONTENTS

I. INTRODUCTION AND OVERVIEW 1
II. ANALYTICAL OVERVIEW OF THE REGION 4
A. Analysis of Employment and Unemployment Data 8
B. Analysis of the Educational and Skill Levels of the Workforce, the Current Needs of Employers in the Region, and Relevant Skill Gaps 14
C. Analysis of Industries and Occupations with Existing and Emerging Demand 19
III. REGIONAL INDICATORS 21
A. Regional Indicator and Associated Outcomes and Metrics 21
IV. FOSTERING DEMAND-DRIVEN SKILLS ATTAINMENT 25
A. In-Demand Industry Sectors for the Region 25
B. Sector Strategies and Other Industry-Focused Initiatives 28
C. Strategies to Communicate with Regional Employers 30
V. ENABLING UPWARD MOBILITY FOR ALL CALIFORNIANS 31
A. Working with Businesses that Provide Quality Jobs 31
B. Shared Target Populations and Targeted Service Strategies 32
C. Equity and Ensuring Equal Access to Training and Services 33
VI. ALIGNING, COORDINATING, AND INTEGRATING PROGRAMS AND SERVICES 35
A. Regional Service Strategies 35
B. Regional Administrative Cost Arrangements 36
VII. PRIORITY CONSIDERATIONS FOR PROGRAM YEARS 2021-24 36
VIII. APPENDICES 40
A. Stakeholder and Community Engagement Summary (Attachment 1) 41
B. Public Comments Received that Disagree with the 2023 Biennial Modification to the PY 21-24 Regional Plan (Attachment 2) 44
C. SIGNATURE PAGE (Attachment 3) 45

I. INTRODUCTION AND OVERVIEW

With the passage of the Workforce Innovation and Opportunity Act (WIOA) of 2014, Congress moved the national workforce system in a new direction regarding how to approach economic and labor market demands. While establishing local workforce areas over the last four decades has always considered local labor markets, WIOA recognizes that economies tend to be regional and may extend beyond the political boundaries that define local areas. WIOA's recognition of regional economies led to California's establishment of Regional Planning Units (RPUs), which represent groups of local workforce areas that work collaboratively to develop strategies reflecting the regional economic needs of businesses and the workforce.

In accordance with federal and state guidance, the Orange Regional Planning Unit has developed a four-year Regional Plan to guide strategic initiatives throughout Program Years (PY) 2021-24, which cover 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.

The Orange Regional Planning Unit

The Orange Regional Planning Unit (RPU) is comprised of the three local Workforce Development Boards (WDBs) serving 34 cities and all unincorporated areas in Orange County. The RPU includes the Anaheim Workforce Development Board, which serves the City of Anaheim, the Santa Ana Workforce Development Board, which serves the City of Santa Ana, and the Orange County Workforce Development Board, which serves the remaining 32 cities and the unincorporated areas of Orange County.

Orange County is the third-most populous county in California (3,162,245 people in 2022)[1] and the sixth-most populous in the nation. Orange County's population declined from 3,169,542 in 2022 and is projected to decrease by 17,537 over the next five years[2]. This decrease reflects an outmigration brought about by rising costs in the region, including housing costs which are among the highest in the state. This can make it difficult for many young people and families to afford to live in Orange County.

Regional Plan Content

WIOA prescribes content for regional plans, which focus principally on the region's labor market, economic conditions, growth industries, and other promising sectors, and how the local workforce development system responds to these factors through sector-based career pathway strategies. WIOA-required local plans supplement the mandatory

[1] California Department of Finance, Demographic Research Unit

[2] *Lightcast*, 2021, https://analyst.lightcast.io/.

elements of the regional plan by describing how the workforce system partners collaborate to develop and implement services that meet the unique needs of job seekers and businesses in the region. Other required regional plan content, some unique to California, includes regional indicators of success, job quality, and strategies promoting equity.

Development of the Regional Plan and Its 2023 Modification

After the implementation of WIOA, an initial four-year plan was developed for the region, which covered PY 2017-20. It was updated in 2019 in accordance with statutory requirements. In response to guidance published by state officials in September 2020, Orange RPU representatives began to prepare a new plan for PY 2021-24. However, the context for this planning was unprecedented, as the COVID-19 pandemic was still in its early stages before the widespread availability of vaccines and the reopening of businesses and communities. The PY 21-24 Orange RPU Regional Plan reflects the circumstances under which it was developed, highlighting the immediate and severe impacts and limitations resulting from the pandemic, along with various uncertainties regarding the economy, labor market, and workforce participation. The 2023 Biennial Modification to the PY 21-24 Regional Plan has been developed under far different circumstances than the original version. As such, RPU leadership has been able to address regional approaches and initiatives from a clearer vantage point, where reopening and recovery characterize the regional economic and community landscape.

The original PY 21-24 Regional Plan and this 2023 Modification have benefitted from the intensive review of regional collaboration among the three local boards and input by workforce system partners and other stakeholders. Community input during the 2020/21 process used to develop the Plan led to discussions about the differences between the North and South Orange County communities. For some, the perception of South Orange County is one of affluence with great beaches, schools, and upscale amenities. While affluent areas exist in South Orange County, some vulnerable communities and families live below the federal poverty line. Also noted during these discussions, South County residents have access to fewer community resources and service providers than central and north county areas. As described below, ten of the eleven cities with disadvantaged census tracts are in North Orange County.

Impact of the Pandemic on Businesses and Workers

Orange County experienced several years of job growth and economic vitality, resulting in record-low unemployment rates before the COVID-19 pandemic struck in early 2020. The pandemic derailed this long growth streak. The long-term social and economic impacts of this stall in economic growth remained to be seen when the Regional Plan was being developed in December 2020 and early 2021. As the region has recovered and transitioned to the endemic phase of the coronavirus, the economy is again characterized by many pre-pandemic conditions, including full employment and growth in key sectors. However, many community members and businesses still feel the social and economic

hardship and disruptions that ensued during the height of the pandemic as they struggle to regain footing. The county experienced widespread job loss and economic hardship due to the pandemic, with many small businesses closing permanently.

The COVID-19 pandemic and the resulting economic fallout have disproportionately impacted specific populations and communities. The impacts remain particularly prevalent among Black people, Latinos, and other people of color. Additionally, the virus has disproportionately affected communities of color, with higher infection and death rates. The pandemic exacerbated existing inequalities and economic disparities, highlighting the need for equitable policies, programs, and services that support the most vulnerable populations and disinvested communities to address issues that include disparities in access to healthcare, economic impact, and education. In Orange County, census tracts identified as “disadvantaged” by the California Environmental Protection Agency are located in the eleven Orange County cities of Fullerton, Anaheim, Santa Ana, Garden Grove, Westminster, Stanton, Lake Forest, Huntington Beach, Costa Mesa, Placentia, Buena Park.

The following economic and demographic analyses highlight the immediate and early impacts of COVID-19 on Orange County and subsequent recovery, along with projections for the region throughout the period addressed by the 2023 Biennial Modification to the PY 21-24 Orange RPU Regional Plan.

II. ANALYTICAL OVERVIEW OF THE REGION

There is no question that the COVID-19 pandemic wreaked havoc on the region's communities, labor market, and economy. The education system, with many schools closed for in-person instruction schools adapted to new ways of teaching and learning. Many schools moved to remote or online learning during the pandemic. Schools have reopened, and many continue to offer hybrid programs where students alternate between in-person and online instruction. However, the disruption in higher education is still felt with low enrollments. California's community college enrollments have reached the lowest rate in three decades. Since 2019, enrollment at over 116 campuses has dropped by an estimated 300,000 students, a drastic decrease of 18%. The four Orange County Community College Districts have seen a reduction in the student count in the Spring of 2022 by 43,732 compared to the same semester in 2019.

Economic factors will likely continue influencing student decisions amid rising inflation, the possibility of a recession, and California's high cost of living. Finances and family responsibilities often take precedence over education for low-income families. A survey conducted by the RP Group, a nonprofit research center, of former California community college students found that one-third haven't re-enrolled because they've prioritized work. At the same time, 22% said they have prioritized taking care of family or other dependents. Another 29% said they struggled to keep up with their classes[3].

Orange County's Gross Domestic Product (GDP) took a hit in 2020, dropping to 222,683,756.[4] Orange County's economy ranked 3rd in California and 8th nationally in 2021 based on its GDP. Orange County has employed 1,598,700 in nonfarm jobs as of December 2022. The median household income was $85,400 in 2018, $25,100 above the national average.[5]

Year	GDP
2017	$ 247,314,645
2018	$ 225,920,029
2019	$ 230,680,258
2020	$ 222,683,756
2021	$ 238,228,949

A little over a year after the COVID-19 pandemic began, economists and other observers noted an increase in the job quit rate, as measured by the U.S. Bureau of Labor Statistics (BLS) Job Openings and Labor Turnover Survey (JOLTS) program. While JOLTS recorded a seasonally adjusted quit rate of 2.4% in the second month of the program's existence (January 2001), this rate was not surpassed until March 2021, when it reached 2.5 percent. The rate rose to 2.8% in April 2021, then 3.0% in December 2021[6]. The rise in the quit rate has been called the "Great Resignation," with many popular press articles speculating why individuals have become more willing to leave their current employers. The fact that the labor force participation rate remains below its pre-pandemic high suggests that some who quit their jobs found new jobs, and others exited the labor force.

[3] Statewide Covid-19 Impact Surveys of Students and Employees

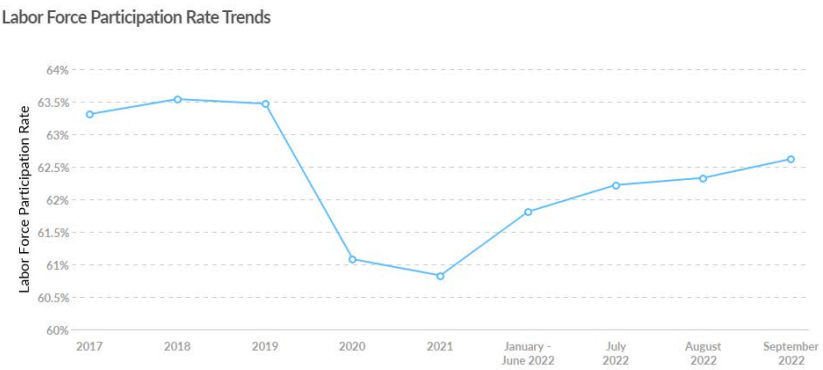
[4] *"GDP: U.S. Bureau of Economic Analysis (BEA)." GDP | U.S. Bureau of Economic Analysis (BEA), www.bea.gov/data/gdp.*

[5] *Lightcast*, 2021, https://analyst.lightcast.io/.

[6] U.S. Bureau of Labor Statistics (bls.gov)

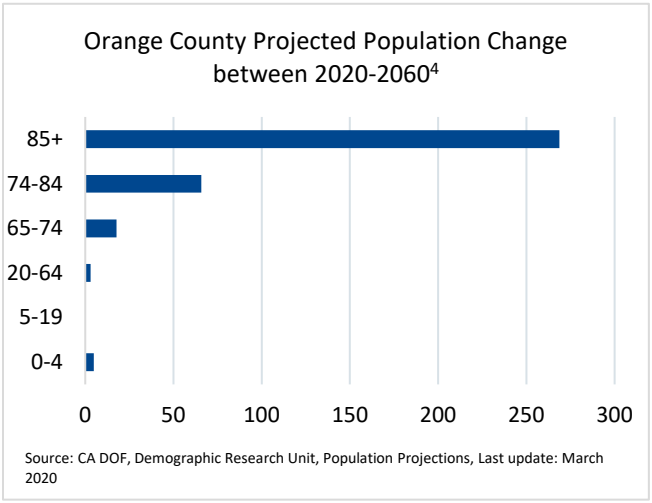
This issue has likely contributed to the current unprecedented labor shortages, and a challenge businesses are expressing across industries in finding talent to fill open positions. Wages increased as companies worked to entice workers back to work after COVID-19 restrictions were lifted. These wage gains, however, were diminished by the high inflation the economy is experiencing.

The Orange County labor force participation rate reached 62.62% in September. The rate is well below the rate before the pandemic. In 2019 the rate was 63.47%. It dipped to 61.08% in 2020 and even lower in 2021 to 60.83%. These numbers indicate that some workers are still inactive despite momentum in the workforce. This may also be the result of outmigration and workers opting to retire over returning to work.

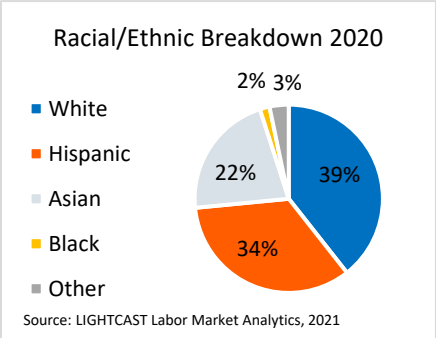


The pandemic has significantly changed the landscape of work. One of the most notable changes has been the shift toward remote work, which has become more common, and some companies have shifted to permanent remote work strategies. Additionally, the pandemic has accelerated the adoption of digital technologies and automation. Companies rapidly digitized operations and processes to continue to operate during lockdowns and social distancing measures, which accelerated the adoption of technology use. The pandemic has also highlighted the importance of specific industries and occupations, particularly those related to healthcare, logistics, and online delivery. It has also shown the importance of gig economy workers and the need for better protection and benefits.

The county is experiencing demographic shifts with economic and workforce implications. Orange County's senior population will continue to increase significantly while working-age populations fall. According to the California Department of Finance, estimates show that seniors 65-74 will increase by 17.75%, the 74-84 group by 65.7%, and 85 or older will increase by 268.7%. The population change will require increased employment in healthcare and other senior service



occupations. The shrinking working-age population could impact economic prosperity and cause more challenges for employers filling open positions.



Ethnic diversity in Orange County is high. The national average for an area the size of Orange County is 1,289,103 racially diverse people, while there are 1.95 million in Orange County.[7] Orange County's diversity is projected to continue to grow through 2060. Whites (39%) and Hispanics[8] (36%) make up the largest percentage of the Orange County population. White population declined by 8% between 2017 and 2023.[9] Growing diversity will increasingly be a key workforce and economic development advantage for Orange County. Diversity often creates an environment where exchanging ideas, strategies, and viewpoints fuels innovation and entrepreneurship, contributing to sustained economic success. Racial diversity challenges local education providers and workforce development to support English learners' success by improving program support and creating innovative programs such as vocational ESL programs. Non-English speakers represent 45.5% of Orange County residents, which is higher than the national average of 21.9%. In 2018, Spanish was the most common non-English language spoken, with 24.8% of Orange County residents being native Spanish speakers. Vietnamese (6.44%) and Mandarin (2.94%) are the second and third most common languages.[10]

Many diverse populations, low-income communities, communities of color, and immigrant communities experience disproportionate economic and social impacts due to systemic inequalities. These include limited access to education, employment opportunities, healthcare, higher poverty rates, unemployment, and underemployment. Additionally, these communities are more vulnerable to the impacts of natural disasters like COVID-19, environmental pollution, and other forms of environmental injustice. The pandemic has disproportionately affected these communities, with higher rates of illness and death among people of color. Many within this population have been hit harder by the economic downturn.

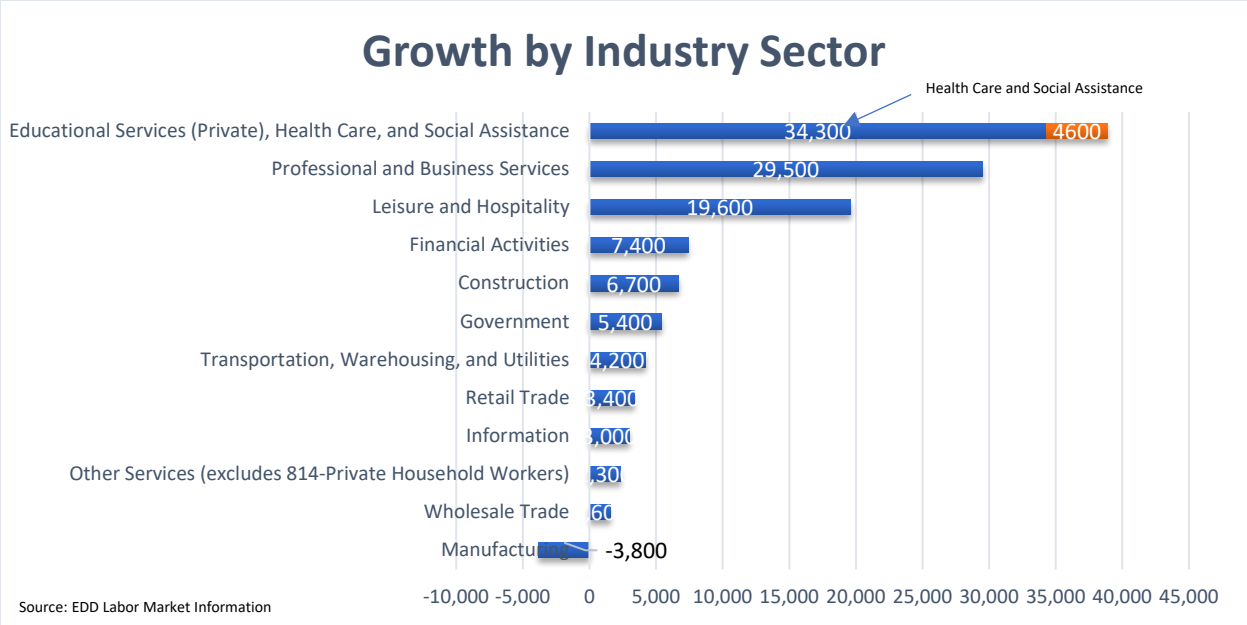
Industry employment, including self-employment, private household workers, and farm and nonfarm jobs in Orange County, is projected to reach 1,890,300 by 2028, a 7.2% increase over the ten-year projection period of 2018 to 2028. Eleven of the 13 nonfarm industry sectors are projected to grow during this period.

[7] *Lightcast*, 2021, https://analyst.lightcast.io/.

[8] *Lightcast*, 2021, https://analyst.lightcast.io/, Hispanic population includes all races that identify as Hispanic.

[9] *Lightcast*, 2021, https://analyst.lightcast.io/.

[10] Bureau, US Census. "American Community Survey Data Releases." *The United States Census Bureau*, 31 July 2020, www.census.gov/programs-surveys/acs/news/data-releases.2018.html.



Total nonfarm jobs are projected to gain 118,000 jobs by 2028. Significant job growth is projected in four industry sectors. Educational, health services, and social assistance are expected to gain 38,900 jobs, with 18,400 projected to be in ambulatory health care services and 34,300 in health care and social services. Professional and business services are projected to add 29,500 jobs. In 2020, leisure and hospitality were projected to grow by 12.9%, adding 27,400 jobs. The growth projection has decreased to 8.8%, adding 19,600 jobs. Construction projections also have fallen, with a projected increase of 6,700 jobs by 2028 instead of 19,000 jobs by 2026.[11]

The industry sectors that added the most jobs between 2020 and 2023 are represented in the chart below.

Jobs & Growth				
NAICS	**Description**	**2020 Jobs**	**2023 Jobs**	**2020 - 2023 Change**
62	Health Care and Social Assistance	191,913	215,168	23,255
72	Accommodation and Food Services	131,918	145,039	13,121
56	Administrative and Support and Waste Management and Remediation Services	140,387	151,255	10,868
55	Professional, Scientific, and Technical Services	128,559	136,465	7,906
23	Educational Services	27,682	32,761	5,079

Source: LIGHTCAST 2023

Orange County is a thriving hub for medical device companies and cutting-edge industry sectors, including life sciences, information technology, digital arts and media, and

[11] *Labor Market Information*, EDD, 2021, www.labormarketinfo.edd.ca.gov

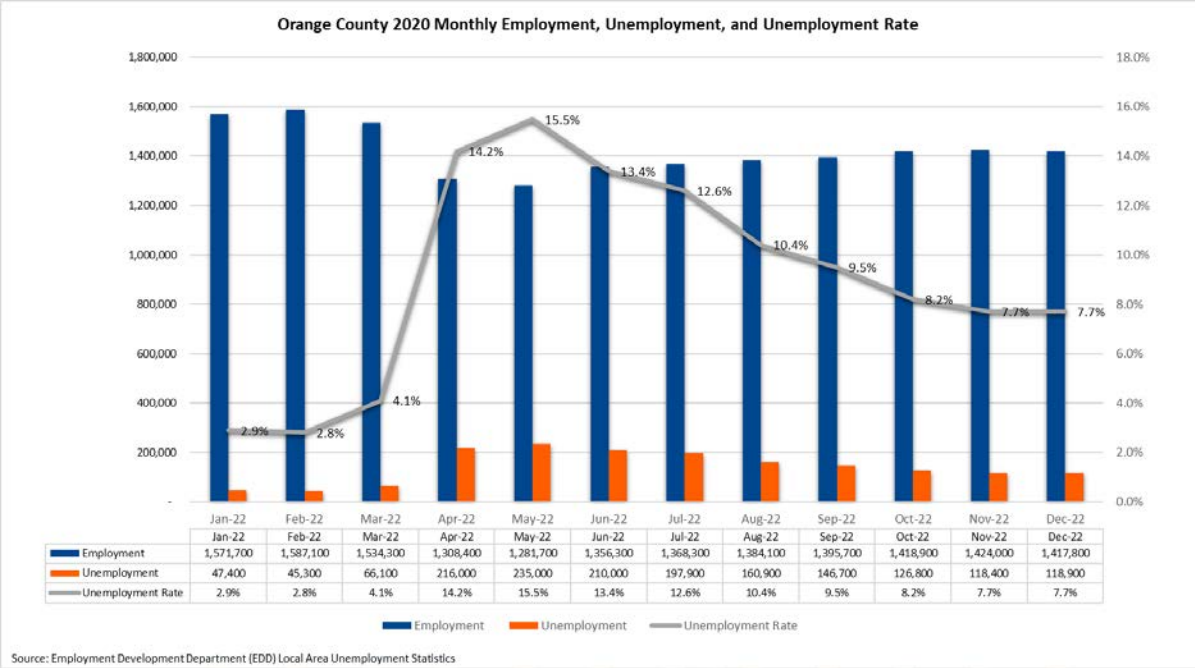
advanced manufacturing. It is also known for its growing ecosystem of entrepreneurship and innovation. Many Southern California startups concentrate on virtual and augmented reality, cybersecurity, biomedical science, bioengineering, medical imaging, medical device, and environmental health technologies. Over the next several years, Orange County is poised to be at the center of emergent industries based on educational and intellectual assets in the region. The county's most robust traded clusters with a high employment specialization in the area are medical device manufacturing (US Ranking 1), lighting and electrical equipment manufacturing (US Ranking 2), apparel manufacturing (US Ranking 3), information technology and analytical instruments manufacturing (US Ranking 5), and financial services (US Ranking 6).[12]

A. Analysis of Employment and Unemployment Data

Unemployment as of December 2022 is at 2.5%, which is lower than the pre-pandemic levels. Orange County had a positive economic outlook before the impacts of the COVID-19 pandemic. In January 2020, Orange County had an unemployment rate of 2.9%, the lowest in Southern California. In the preceding 12 months, the county's unemployment rate had not exceeded 3.1%. Before California's first statewide stay-at-home order was issued in March 2020, closing all nonessential businesses and restaurant dining, the unemployment rate stood at 2.8% in February of that year. The economic disruption from COVID-19 resulted in steep job losses, with the unemployment rate quadrupling at its peak of 15.5% in May 2020, the highest unemployment rate ever recorded for Orange County. The rates slowly declined to 7.7% in November 2020 and remained at 7.7% in December 2020 when regional stay-at-home orders went back into effect. This rate compares with an unadjusted unemployment rate of 8.8 percent for California and 6.4 percent for the nation during the same period.[13]

[12] "U.S. Cluster Mapping: Mapping a Nation of Regional Clusters." *U.S. Cluster Mapping | Mapping a Nation of Regional Clusters*, www.clustermapping.us/.

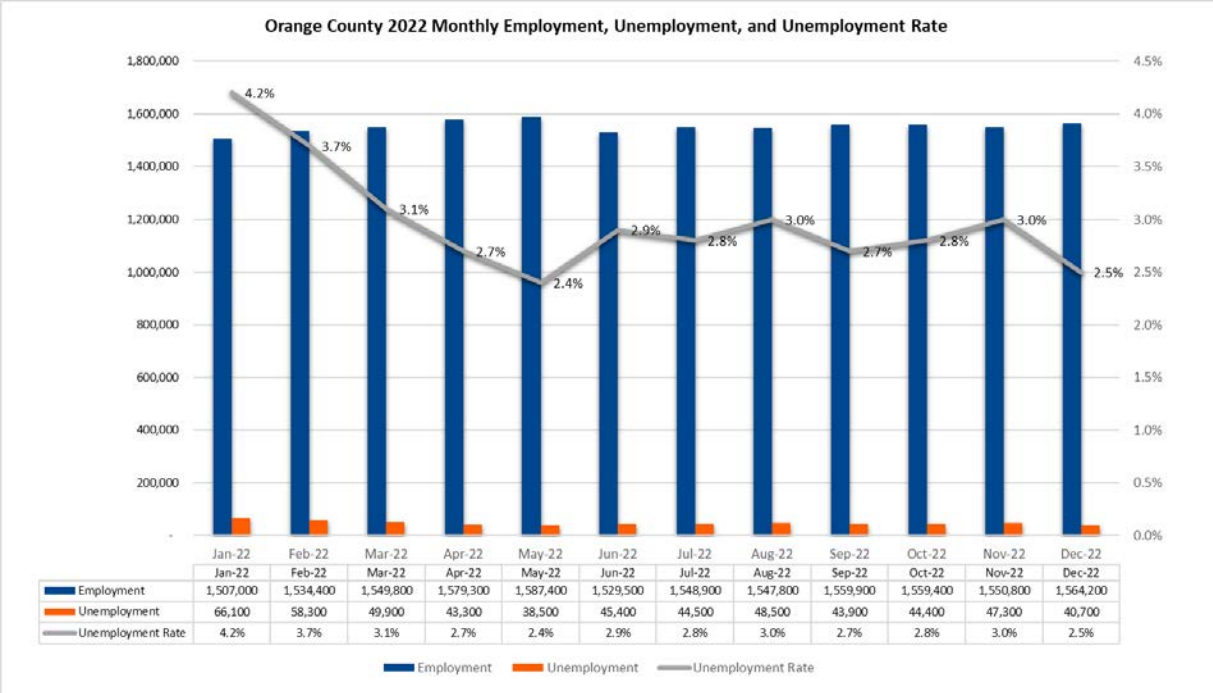
[13] *Labor Market Information*, EDD, 2021, www.labormarketinfo.edd.ca.gov/data/lmi-by-subjects.html.



Source: Employment Development Department (EDD) Local Area Unemployment Statistics

14

The unemployment rate is 2.5% as of December 2022, below the pre-pandemic level of 2.8% from February 2020. Unemployment rates sharply fell between January 2022 to May 2022. In June, the levels increased and have fluctuated slightly since.



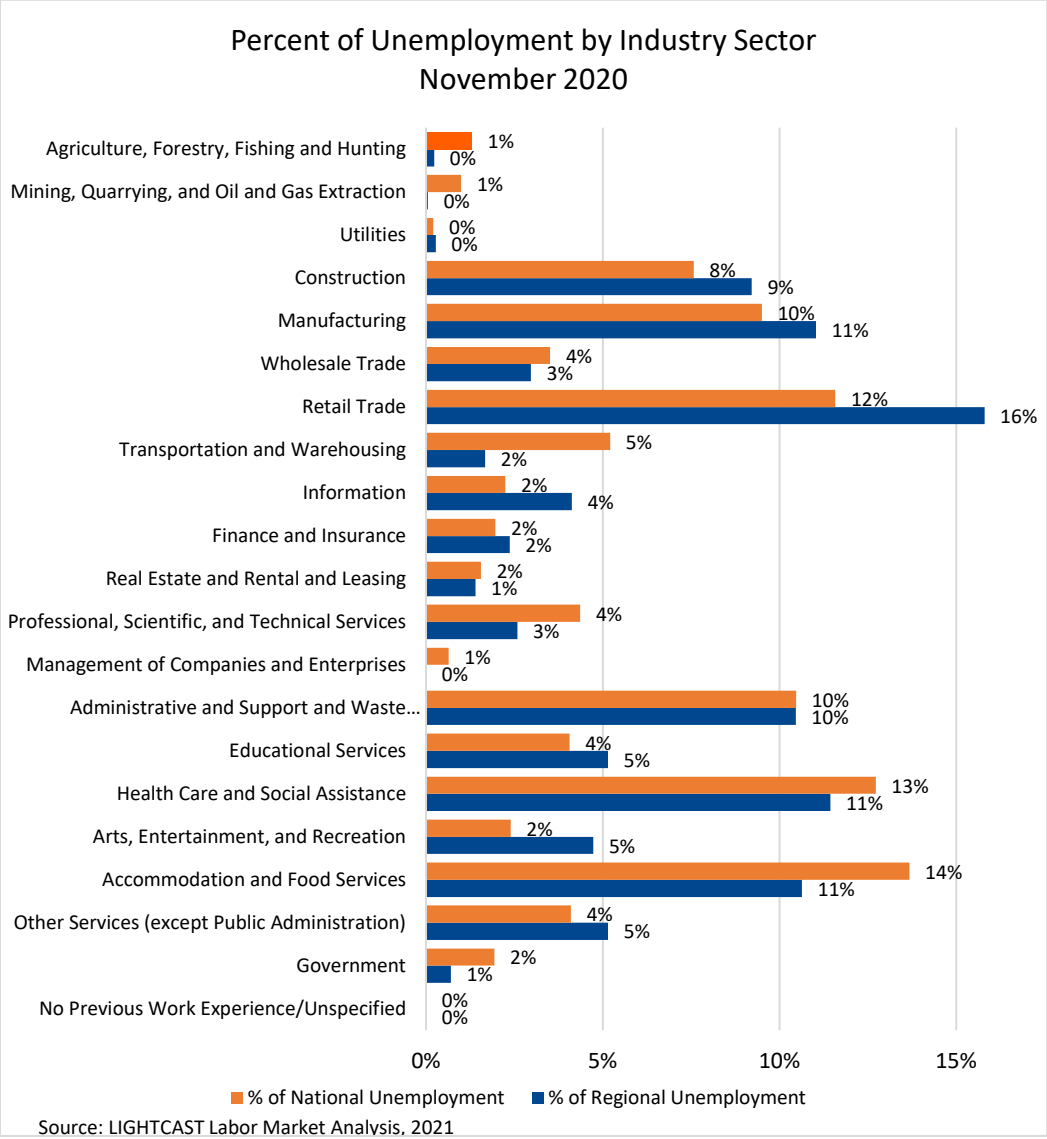
Source: Employment Development Department (EDD) Local Area Unemployment Statistics

15

[14] *Labor Market Information*, EDD, 2023, Local Area Unemployment Statistics Orange County

[15] *Labor Market Information*, EDD, 2023, Local Area Unemployment Statistics Orange County

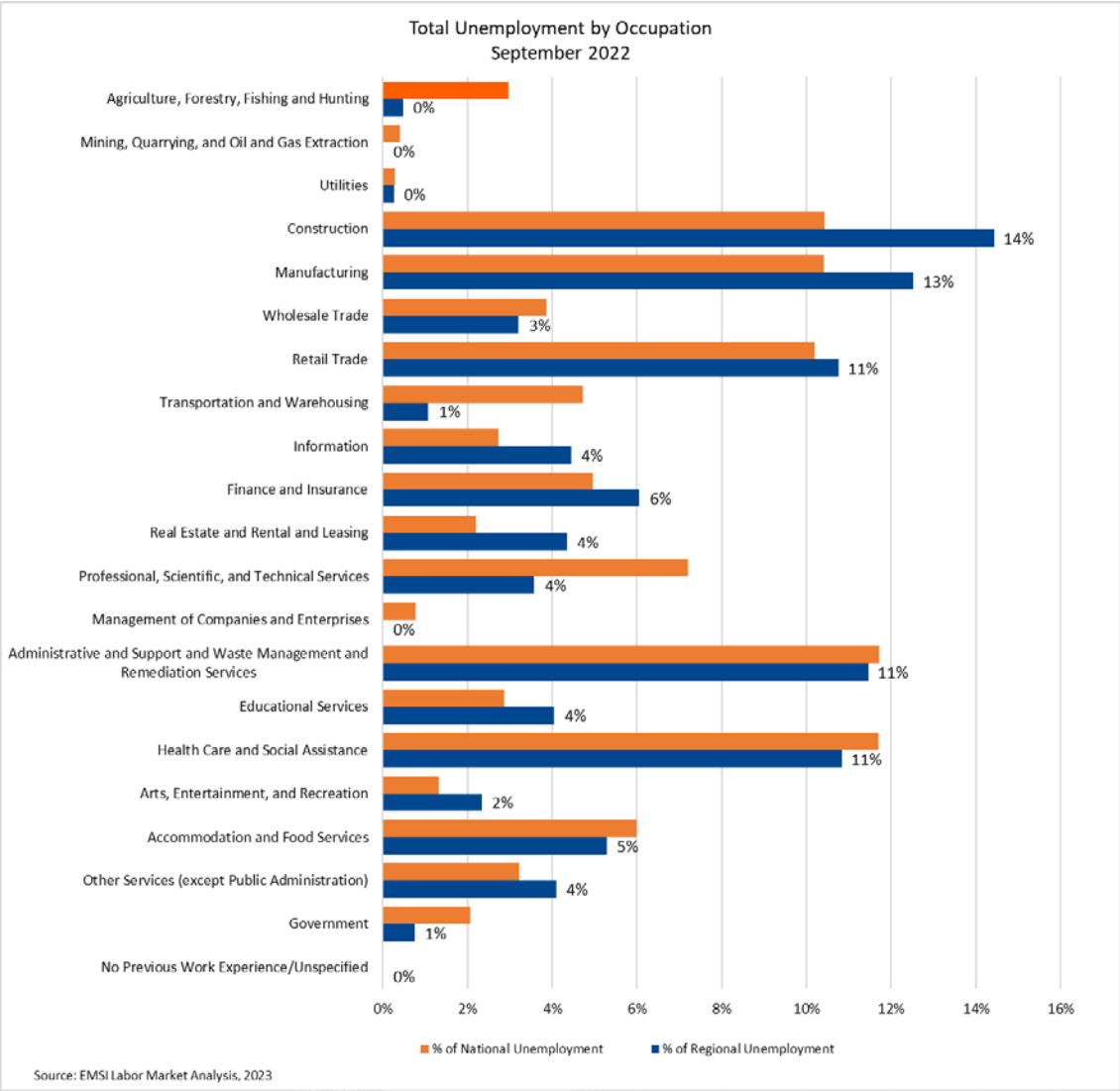
Concentrated job loss in hospitality and tourism stung more sharply during the pandemic in the Orange County region due to its economic dependence on tourism. In 2019, a record 50.2 million travelers visited Orange County, spending $13.0 billion.[16] However, with the sustained closure during the pandemic of major tourism sites, especially Disneyland Park, the leisure and hospitality industry and surrounding cities remain heavily impacted. The percentage of unemployment by industry sector showed a grim picture for industries that rely heavily on tourism. As of November 2020, retail trade had the highest unemployment numbers at 16,063, and accommodation and food services had 10,815 unemployed. Other industries with high numbers of unemployment include healthcare and social assistance (11,628), manufacturing (11,215), and construction (9,371). [17]



[16] *Orange County Visitors Association, 2019, Orange County Visitors Association 2019-2021 Destination Marketing Plan, www.travelcostamesa.com/visittheoc/wp-content/uploads/2019/08/Marketing.pdf.*

[17] *Lightcast*, 2021, https://analyst.lightcast.io/.

The leisure and hospitality industry has rebounded, recovering all jobs lost during the pandemic. However, subsector unemployment in retail trade (11%) remains high. Construction (14%) and manufacturing (13%) are other Orange County industries with high unemployment rates above the national average.



The pandemic-induced recession caused a loss of 267,400 nonfarm jobs between February and April 2020 in Orange County. The employment loss between March and April of 2020 alone was 225,800, the largest ever recorded in a single month. All industry sectors experienced declines between February and April, but leisure and hospitality (down 102,800) accounted for 38 percent of the total nonfarm job loss during this period[18]. Most of the decline was between March and April, with a loss of 90,300 jobs. Seventy-seven percent of the drop occurred in accommodation and food services (down 70,300 jobs), led by decreases in food services and drinking places (down 59,800 jobs). Other

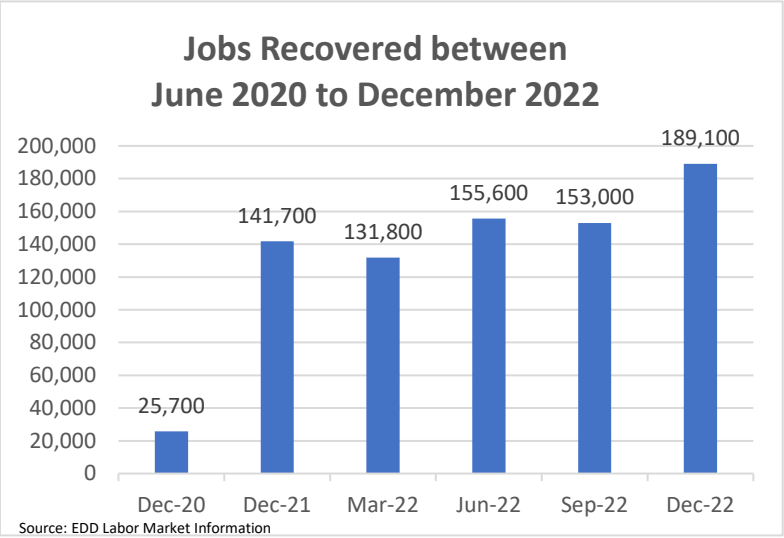
[18] *Labor Market Information*, EDD, 2023, Orange County monthly industry employment

significant drops during this period include arts, entertainment, and recreation, which fell by 20,000 jobs. Trade, transportation, and utilities decreased by 31,400 jobs, with retail trade accounting for 66 percent of the decline (down 20,800 jobs). Wholesale trade dropped by 8,800 jobs, and transportation, warehousing, and utilities decreased by 1,800 jobs. Professional and business services declined by 29,200 jobs. Administrative and support services, which includes temporary help firms, dropped by 18,900 jobs.[19]

Pandemic Job-Related Losses[20]

Industry	Feb-20	Mar-20	Apr-20	Dec-20	Feb to Apr	% change	April 2020 to December 2022	% of losses recovered	Shortfall as of December 2022
Total Nonfarm	1,683,400	1,660,200	1,414,000	1,540,100	-267,600	15.9%	293,200	108.8%	23,800
Construction	106,400	103,000	92,700	100,700	-8,600	8%	15,600	114%	1,900
Manufacturing	159,000	158,200	143,900	148,700	-15,500	9.8%	13,900	92.1%	-1,200
Transportation & Warehousing	27,300	26,800	24,300	29,200	-2,400	9.0%	-6,700	-223.3%	-9,700
Professional & Business Services	327,900	321,800	289,200	315,600	-37,900	12%	47,600	123%	8,900
Educational Services	33,400	32,400	26,100	29,100	-3,400	9.9%	11,300	154.8%	4,000
Health Care & Social Assistance	205,800	204,000	181,200	203,300	-28,000	14.0%	39,500	160.6%	14,900
Leisure & Hospitality	225,800	220,300	133,100	148,900	-102,800	45.2%	90,700	97.8%	-2,000
Other Services	54,400	52,900	34,600	42,600	-17,800	35.0%	17,600	88.9%	-2,200
Government	168,000	169,100	159,000	154,500	-6,700	4.0%	3,200	35.6%	-5,800

Employment Recovery



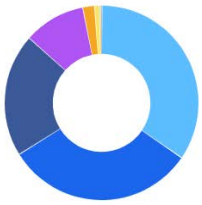
In December 2020, as California moved slowly toward reopening, regional differences contributed to the pace of recovery. The depth of job losses and Orange County's reliance on service sectors meant the region would have to make up more ground than other regions in the state. How quickly businesses reopened and how public health risks evolved contributed to their viability. The recovery pace was slower for sectors and companies that relied on in-person interaction. As of December 2020, the county recovered 142,800 nonfarm jobs, equivalent to 53% of the job losses since the pandemic recession. Most industries are experiencing incremental job gains monthly. Transportation, utilities, and construction jobs have exceeded pre-pandemic levels, with the largest month-over increase, up 4,200 jobs. Wholesale trade gained 1,800 jobs, retail

[19] *Labor Market Information*, EDD, 2021, https://www.labormarketinfo.edd.ca.gov/geography/orange-county.html

[20] *Labor Market Information*, EDD, 2023, Industry Employment & Labor Force

trade added 1,500 jobs, and transportation, warehousing, and utilities expanded by 900 jobs.[21] As of December 2022, the county recovered 189,100 nonfarm jobs.

Business Size



	Percentage	Business Count
1 to 4 employees	34.5%	47,724
5 to 9 employees	31.6%	43,723
10 to 19 employees	20.4%	28,308
20 to 49 employees	10.3%	14,249
50 to 99 employees	2.0%	2,715
100 to 249 employees	0.8%	1,128
250 to 499 employees	0.2%	335
500+ employees	0.2%	250

*Business Data by DatabaseUSA.com is third-party data provided by Lightcast to its customers as a convenience, and Lightcast does not endorse or warrant its accuracy or consistency with other published Lightcast data. In most cases, the Business Count will not match total companies with profiles on the summary tab.

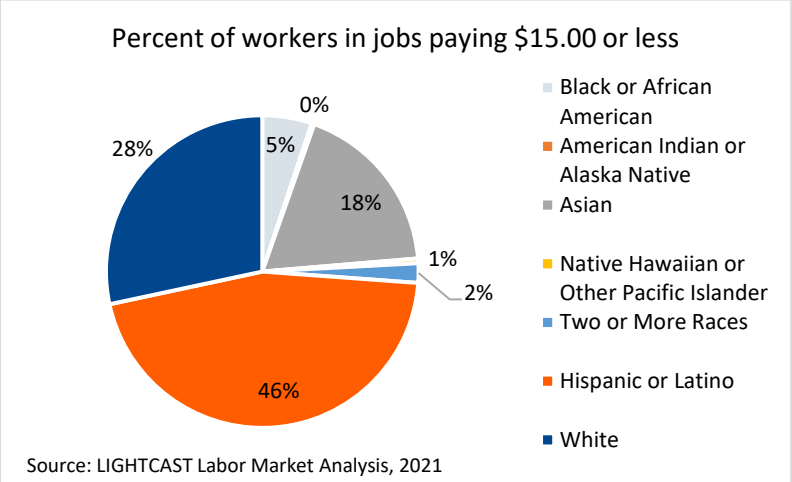
Most businesses in the County have less than 49 employees. The revenue of small businesses in April 2020 decreased by 52.1% compared to January 2020. As of February 06, 2022, total small business revenue increased by 6.2% compared to January 2020. The number of small businesses open in February 2022 increased by 5.1% compared to January 2020.

As of December 2022, Orange County has recovered from its job losses during the pandemic. Orange County lost 269,400 nonfarm jobs between February 2020 and April 2020. As of December 2022, OC has recovered 100% of the jobs it lost during the pandemic. The County gained 288,400 nonfarm jobs between April 2020 to December 2022. Government, manufacturing, financial services, and other services are industries that have yet to recover fully.

Orange County Employment Recovery [22]			
Title	**Feb 20 - Apr 20**	**Apr 20 - Dec 22**	**Surplus/Deficit**
Total Nonfarm	(269,400)	288,400	19,000
Leisure & Hospitality	(92,700)	95,800	3,100
Trade, Trans. & Utilities	(39,200)	45,000	5,800
Prof. & Bus. Svcs.	(38,600)	48,400	9,800
Edu. & Health Svcs.	(31,900)	50,300	18,400
Other Services	(19,800)	14,200	(5,600)
Manufacturing	(15,200)	14,400	(800)
Construction	(13,700)	16,700	3,000
Government	(9,000)	-	(9,000)
Financial Activities	(7,000)	800	(6,200)
Information	(2,300)	2,800	500

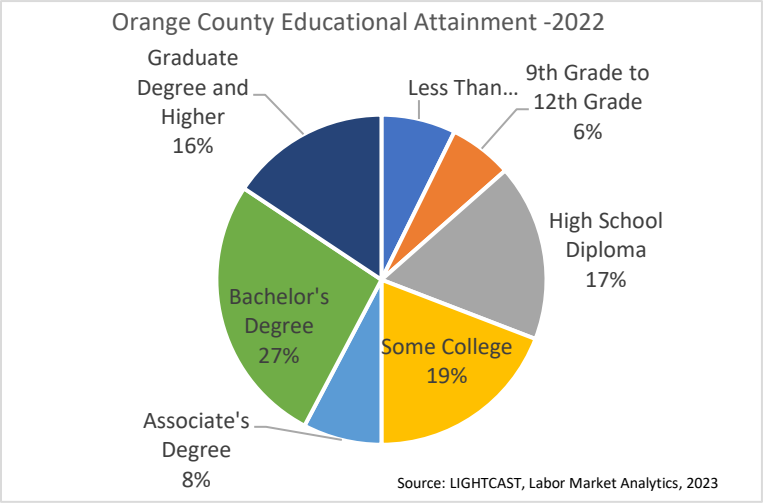
[21] *Labor Market Information*, EDD, 2021, www.labormarketinfo.edd.ca.gov/data/lmi-by-subjects.html.
[22] EDD Labor Market Information Division - Home Page (ca.gov)

According to Opportunity Insight's Economic Tracker, the drastic difference between the low and high quartiles shows that the pandemic disproportionately affected lower-income bracket workers. In Orange County, as of November 15, 2020, employment rates among workers in the bottom wage quartile (<$29K) decreased by 21.9%, the middle quartile ($29K-$73K) decreased by 8%, and the high quartile (>$60k) increased 7.9% compared to January 2020[23]. The same data, as of November 2022, shows those in the bottom quartile still have the largest drop in employment rates compared to January 2020, at 23.3%. Minority residents mostly held these lower-paying jobs and became much more financially insecure and unstable in this economic crisis.



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

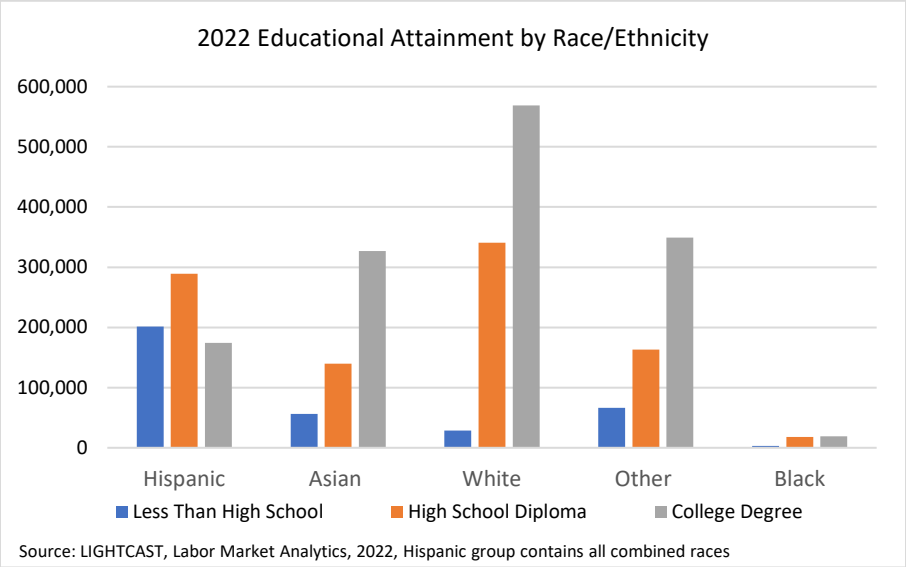
Orange County is home to major universities such as the University of California, Irvine (UCI), California State University, Fullerton (CSUF), and Chapman University. The County has four community college districts with nine community colleges. These community colleges annually educate approximately 310,000 students in credit and noncredit courses.



[23] "The Economic Tracker." Economic Tracker, tracktherecovery.org/.

Orange County's primary competitive advantage is a talent pool of highly educated, qualified residents. In Orange County, 50% of adults over 25 have an associate degree or higher, while only 13.49% lack a high school diploma. Orange County residents with bachelor's degrees are 6.3% above the national average, and 7.7% hold an associate degree, which is 0.9% below the national average.

Education data covers the population aged 25 years or older, indicating the highest level of education achieved. Inequitable access to postsecondary education is a persistent problem. One way in which this manifests is through widely varying educational attainment across races and ethnicity. California's Post-secondary to Prosperity Dashboard shows that only 16% of Latino residents hold a four-year degree. The dashboard also shows that most Latino residents have no college experience (59%), greater than all other groups.[24]



The most popular college majors in Orange County are Liberal Arts and Sciences (16,678 and 20%), Business Administration and Management (7,978 and 9%), and General Psychology (3,041 and 4%).

Orange County Regional Institutions Top Program Completions [25]

CIP Code	Program	Completions (2021)
24.0101	Liberal Arts and Sciences/Liberal Studies	16,678
52.0201	Business Administration and Management, General	7,978
42.0101	Psychology, General	3,041
30.9999	Multi-/Interdisciplinary Studies, Other	2,636
51.3801	Registered Nursing/Registered Nurse	2,161
24.0103	Humanities/Humanistic Studies	1,863
11.0701	Computer Science	1,631
09.0101	Speech Communication and Rhetoric	1,522
30.0101	Biological and Physical Sciences	1,512
24.0101	Liberal Arts and Sciences/Liberal Studies	16,678

[24] "P2P Regions." *California Competes*, californiacompetes.org/p2p/regions?region=orange.
[25] *Lightcast*, 2022, https://analyst.lightcast.io/.

The employer need in the Orange County region is based on job postings, employment data analysis, and educational programs' completions. Per the two-digit Standard Occupational Classification (SOC) code group, twenty-four occupations and 638 programs in the region of study may train for these occupations. Of these programs, there were 84,384,331 program participant completions in 2021 and 233,945 job openings. The job openings are up from the 2019 number of 196,852.

Identified in the table below are the occupations with the highest projected skills gap for Orange County between 2022 and 2027. This analysis indicates a continued need to identify strategies to fulfill training requirements in various high-gap occupational areas. The research includes data based on the following:

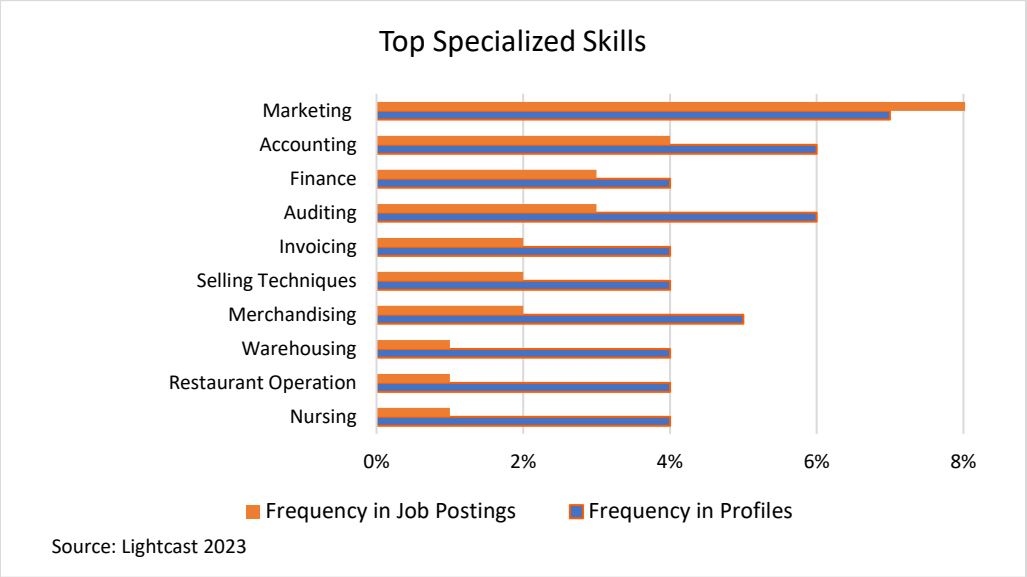
- Occupations where the 2022 median hourly wage exceeds $16.00 an hour.
- Openings greater than 10 (openings represent replacement jobs and BLS growth estimates).
- Entry-level education greater than a postsecondary nondegree award less than a bachelor's degree.
- Top 20 occupations with skills gaps (skills gap is the difference between the projected openings and completions).
- The openings figure estimates the change in growth and replacement jobs (i.e., growth + replacements = openings). Growth captures the change in the total number of workers employed in an occupation. At the same time, replacement jobs are estimates of workers permanently leaving a career and needing to be replaced by new hires. A combination of both numbers indicates total openings.

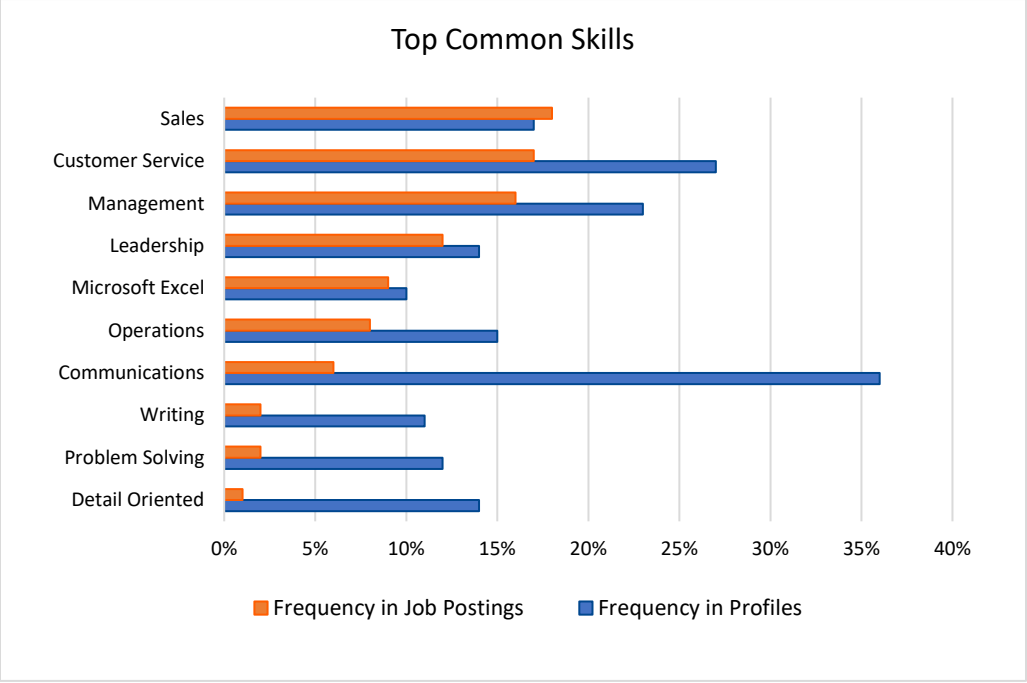
Skills Gap by Occupation[26]

SOC	Description	2022 Jobs	2027 Jobs	2022 - 2027 Change	2022 - 2027 Replacement Jobs	2022 - 2027 Openings	Regional Completions (2021)	Skills Gap	Median Hourly Earnings	Typical Entry-Level Education
43-3031	Bookkeeping, Accounting, and Auditing Clerks	18,815	18,891	76	11,625	11,751	858	10,893	$22.76	Some college, no degree
31-1131	Nursing Assistants	8,207	9,184	977	6,469	7,446	146	7,300	$18.61	Postsecondary nondegree award
53-3032	Heavy and Tractor-Trailer Truck Drivers	10,813	11,312	499	6,473	6,972	0	6,972	$24.09	Postsecondary nondegree award
31-9092	Medical Assistants	8,558	9,603	1,046	6,281	7,327	2,580	4,747	$18.51	Postsecondary nondegree award
31-9091	Dental Assistants	5,095	5,697	601	3,852	4,453	215	4,238	$23.29	Postsecondary nondegree award
25-9045	Teaching Assistants, Except Postsecondary	10,095	10,866	771	6,106	6,877	2,639	4,238	$17.99	Some college, no degree
29-2061	Licensed Practical and Licensed Vocational Nurses	6,782	7,463	682	2,872	3,553	560	2,993	$30.64	Postsecondary nondegree award
49-3023	Automotive Service Technicians and Mechanics	5,247	5,454	207	2,618	2,825	278	2,547	$25.57	Postsecondary nondegree award
39-5012	Hairdressers, Hairstylists, and Cosmetologists	2,383	3,353	970	1,959	2,929	492	2,437	$15.84	Postsecondary nondegree award
39-5092	Manicurists and Pedicurists	3,619	4,491	872	2,537	3,409	1,108	2,301	$14.00	Postsecondary nondegree award
23-2011	Paralegals and Legal Assistants	3,644	4,112	468	2,077	2,545	265	2,280	$27.09	Associate's degree
31-9094	Medical Transcriptionists	2,143	2,187	44	1,813	1,859	50	1,809	$17.49	Postsecondary nondegree award
31-9097	Phlebotomists	1,739	2,093	353	1,347	1,701	1	1,700	$24.07	Postsecondary nondegree award
31-9011	Massage Therapists	1,519	1,923	404	1,151	1,554	64	1,490	$22.79	Postsecondary nondegree award
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	3,396	3,664	268	1,659	1,927	443	1,484	$31.15	Postsecondary nondegree award
29-1292	Dental Hygienists	3,328	3,710	381	1,142	1,523	117	1,406	$48.83	Associate's degree
43-4151	Order Clerks	2,187	2,063	(124)	1,254	1,254	26	1,228	$18.34	Some college, no degree
17-3011	Architectural and Civil Drafters	2,247	2,304	57	1,299	1,356	147	1,209	$30.41	Associate's degree
49-2022	Telecommunications Equipment Installers and Repairers, Except Line Installers	1,750	1,679	(71)	975	975	34	941	$30.36	Postsecondary nondegree award
17-3023	Electrical and Electronic Engineering Technologists and Technicians	1,852	1,832	(20)	987	987	82	905	$32.11	Associate's degree

[26] *Lightcast*, 2023, https://analyst.lightcast.io/.

The top three hard skills requested by employers in job postings between January 2020 to January 2021 were accounting, auditing, and customer relationship management. The following charts show the top specialized skills and the top common skills in relation to the frequency these skills appeared in job seeker profiles. Specialized skills are primarily required within a subset of occupations or equip one to perform a specific task. They are also known as technical skills or hard skills. Common Skills are prevalent across many different occupations and industries, including personal attributes and learned skills. They are also known as soft skills, human skills, and competencies.





C. Analysis of Industries and Occupations with Existing and Emerging Demand

The RPU analyzed location quotient, total jobs, and competitive effect data to identify industries and occupations with emerging demand. An analysis of location quotient data demonstrated which occupations and industries are specialized in the Orange County region (compared to the national average). The competitive effect indicates how much job change results from some distinct competitive advantage in the area. The competitive effect measures the job change that cannot be explained by national growth and industry mix. The difference in competitive effect points to regional-specific factors on the change in local employment numbers. Factors such as labor force training and education, skills, transportation, supply chains, aging demographics, and other regionally influenced factors may impact these industries' and occupations' competitiveness.

Mature	Growing
Location Quotients are greater than 1.2 and steadily decreasing	Location Quotients are greater than 1.2 and steadily increasing
Declining	**Emerging**
Location Quotient is less than 1.2 and steadily decreasing	**Location Quotient is less than 1.2 and steadily increasing**

Using the 3-digit NAICS code, the emerging industries identified had a location quotient that increased between 2017 and 2022 and had a location quotient of less than 1.2. The industry list was filtered to include industries with a competitive effect greater than 1 percent change in jobs higher than 10% and more than 1,000 jobs. The following chart consists of a list of the top thirteen emerging industries in Orange County. This combined list of sectors accounted for 321,154 jobs in 2022. This group of industries is projected to grow to 490,109 jobs by 2027.

Industries with Emerging Demand

NAICS	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	Competitive Effect	2017 Location Quotient	2022 Location Quotient
812	Personal and Laundry Services	14,962	17,548	2,586	17%	3,022	0.92	1.12
621	Ambulatory Health Care Services	83,749	96,902	13,153	16%	5,060	1.04	1.12
624	Social Assistance	41,158	49,209	8,051	20%	4,189	1.00	1.11
446	Health and Personal Care Stores	11,540	12,173	633	5%	1,104	0.98	1.09
611	Educational Services	26,794	32,837	6,044	23%	5,177	0.86	1.03
325	Chemical Manufacturing	7,937	8,844	908	11%	315	0.87	0.92
454	Nonstore Retailers	5,371	6,377	1,006	19%	405	0.84	0.91
623	Nursing and Residential Care Facilities	26,290	26,328	39	0%	2,887	0.71	0.81
814	Private Households	1,624	1,903	278	17%	690	0.51	0.81
312	Beverage and Tobacco Product Manufacturing	1,862	2,359	497	27%	124	0.64	0.68
622	Hospitals	31,995	32,653	658	2%	516	0.58	0.59
902	State Government	25,468	25,822	354	1%	940	0.50	0.52
515	Broadcasting (except Internet)	962	1,006	44	5%	177	0.32	0.40
484	Truck Transportation	5,016	6,074	1,058	21%	776	0.31	0.36
481	Air Transportation	903	1,119	216	24%	237	0.17	0.21

Source: LIGHTCAST, 2023

The following is a list of the occupations in Orange County with emerging demand. These occupations have a location quotient of less than 1.2 as of 2022. The location quotient has increased since 2017. The competitive effect is positive in these professions, demonstrating a high degree of regional-specific factors influencing job growth.

Occupations with Emerging Demand

SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	Median Hourly Earnings	Competitive Effect	2017 Location Quotient	2022 Location Quotient
31-1100	Home Health and Personal Care Aides; and Nursing Assistants, Orderlies, and Psychiatric Aides	44,489	57,510	13,021	$14.15	9,736	0.88	1.08
53-6000	Other Transportation Workers	3,225	3,596	372	$14.92	895	0.77	1.04
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	21,472	23,687	2,215	$25.30	490	0.95	0.99
35-1000	Supervisors of Food Preparation and Serving Workers	10,199	13,637	3,438	$18.32	1,340	0.87	0.98
27-4000	Media and Communication Equipment Workers	2,082	2,246	164	$23.52	330	0.82	0.97
25-1000	Postsecondary Teachers	13,553	13,946	393	$45.12	686	0.91	0.97
25-9000	Other Educational Instruction and Library Occupations	16,767	17,382	614	$18.86	371	0.92	0.95
19-3000	Social Scientists and Related Workers	2,432	2,557	124	$48.37	30	0.88	0.90
19-4000	Life, Physical, and Social Science Technicians	3,377	3,676	300	$24.30	305	0.81	0.90
27-3000	Media and Communication Workers	5,562	5,623	61	$32.45	57	0.85	0.87
29-2000	Health Technologists and Technicians	23,974	27,571	3,597	$28.58	3,229	0.75	0.86
29-1000	Healthcare Diagnosing or Treating Practitioners	46,324	52,960	6,637	$56.77	3,765	0.76	0.83
51-3000	Food Processing Workers	6,809	7,256	446	$16.09	282	0.76	0.80
29-9000	Other Healthcare Practitioners and Technical Occupations	645	1,190	545	$30.02	106	0.71	0.79
39-2000	Animal Care and Service Workers	1,405	2,386	980	$14.46	543	0.59	0.78
47-4000	Other Construction and Related Workers	3,028	3,426	397	$28.07	239	0.67	0.73
25-2000	Preschool, Elementary, Middle, Secondary, and Special Education Teachers	28,039	28,871	832	$42.52	649	0.64	0.66
51-8000	Plant and System Operators	1,411	1,732	321	$38.72	380	0.42	0.54
39-4000	Funeral Service Workers	266	372	106	$17.12	109	0.37	0.53
33-1000	Supervisors of Protective Service Workers	1,169	1,649	480	$57.20	217	0.38	0.44
45-4000	Forest, Conservation, and Logging Workers	117	222	105	$16.42	102	0.20	0.38
53-2000	Air Transportation Workers	1,029	1,069	40	$49.13	44	0.33	0.35
53-5000	Water Transportation Workers	182	294	112	$33.93	115	0.20	0.33
45-1000	Supervisors of Farming, Fishing, and Forestry Workers	107	150	43	$21.86	40	0.21	0.29

Source: LIGHTCAST, 2023

III. 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 one 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.

A. Regional Indicator and Associated Outcomes and Metrics

Members of the three WDBs that comprise the Orange RPU selected indicator A: *The region has a process to communicate industry workforce needs to supply-side partners.*

Indicator A encourages regions to examine supply and demand in key regional sectors and occupations. It requires workforce boards to understand employer demands such as skills, competencies, and the number of positions available in associated jobs. Indicator A asks regions to establish a benchmark around placement into these key jobs and work with supply-side partners to understand the demands and adjust their training services and recruitment as necessary. Supply-side partners refer to a range of potential regional workforce system partners, including community colleges, adult education providers, alternative training providers, human service agencies, and community-based organizations (CBOs). Aligning industry workforce needs and supply-side offerings is critical to understanding the opportunities in regional economies and overcoming the challenges associated with disconnected tracking and reporting systems between training and service providers and employers.

In accordance with guidelines provided in connection with Regional Plan Implementation grants administered by the State Board, regional outcomes and metrics have been established for Indicator A.

Outcomes

Outcomes and associated strategies and metrics have been established for the indicator.

Outcome 1: Region has developed benchmarks and measurements to track improvement in the number of individuals placed in jobs that align with the sectors and occupations emphasized in the Regional Plan. Target sectors include advanced manufacturing;

healthcare; information and communications technology, including digital media; and retail, hospitality and tourism.

Strategies to be used to achieve this outcome will include, but not be limited to, the following:

1.a. Identify a minimum of two demand job classifications per sector to track
1.b. Capture and record jobs to be filled in identified job classifications
1.c. Broadcast jobs to be filled via a regional website
1.d. Track enrollments in training for demand job classifications as reported in CalJOBS
1.e. Track placements made by systems partners using CalJOBS
1.f. Track year-over-year increases in demand job placements for target sectors that are recorded in CalJOBS, adding placements from non-CalJOBS users over time.

Metrics for this outcome are:

1.a. Number of Job Classifications for Which Information will be Provided to Supply-Side Partners: As a measure of effectiveness in identifying the workforce needs of industry, the number of jobs classifications or job titles that the region will track. This will be no less than two demand job classifications per each of the region's four target sectors.

1.b. Number of Demand Job Openings Captured: As a measure of effectiveness in identifying the workforce needs of industry, the number of jobs identified annually in the selected classifications.

1.c. Number of Demand Jobs Broadcast to Supply-Side Partners: As a measure of effectiveness in communicating demand to supply-side partners, the number of jobs broadcast to the partners.

1.d. Number of Individuals Trained for Demand Jobs as Reported in CalJOBS: As a measure of responsiveness to industry demand, the number of individuals enrolled in training to prepare them for demand jobs in target sectors. Initially, individuals tracked will be those reported in CalJOBS. Subsequently, trainees tracked through other data management system, will be included.

1.e Number of Individuals Placed in Target Sector Demand Job Classifications: As a measure of responsiveness to industry demand, the number of individuals placed in demand jobs in targeted sectors. Initially, individuals tracked will be those reported in CalJOBS. Subsequently, placed individuals tracked through other data management systems will be included.

For each of the foregoing measures, year over year increases will be tracked and reported.

Outcome 2: Region has developed benchmarks and methods to track workforce partner professional development training on priority sectors and industry workforce needs.

Strategies to be used to achieve this outcome will include, but not be limited to, the following:

2.a. Distribute EDD monthly labor market information to partners
2.b. Provide professional development training for workforce system partners and staff that addresses the needs of target sectors and its demand occupations
2.c. Develop regional training reports for each target sectors
2.d. Track training participation
2.e. Survey training effectiveness and perception of knowledge gains

Metrics for this outcome are:

2.a. Percentage of Monthly Information "Blasts" Met: As a measure of efficiency in sharing information with supply-side stakeholders, 100% of planned monthly LMI and other sector-related information "blasts" to stakeholders will be achieved.

2.b. Number of Staff Development Training Sessions: As a measure of availability and access, the number of annual sessions during which staff can participate in training, whether in-person or through other modalities.

2.c. Number of Staff Development Training Participants: As a measure of impact on overall system capacity, the total number of WIOA-funded staff and workforce system partner representatives who annually participate in training.

2.d. Staff Development Training Participant Evaluation on "Ability to Apply Information Learned:" As a measure of customer satisfaction regarding training relevance and utility of information provided, 80% of participants will indicate that they can apply information learned to their work.

B. Impact of Indicators and Metrics on Service Delivery

Local workforce system leaders chose to concentrate their joint efforts on communicating industry workforce needs to supply-side partners. This indicator holds significant promise to increase the effectiveness of the workforce system in supporting businesses that are driving economic growth and creating opportunities for prosperity among workers in the region. The emphasis on supporting training and recruitment of workers for demand occupations within priority industries will increase the effectiveness of local boards, their providers, and system partners in developing and implementing sector strategies. Effects of local service delivery will include:

Building Greater Understanding of the Region's Priority Sectors: Frontline staff at America's Job Centers of California (AJCCs), which are administered by the three local workforce development boards in Orange County, have a working understanding of the four regional target sectors, as do the staff of many of the local workforce system partners. As a result of the training that will be provided in connection with the selected regional indicator, knowledge among staff regarding these key industries will not only be increased but also a greater shared understanding of the sectors among the system partners.

Development of Specific Sector Strategies: As measures established for the regional indicator require performance in terms of training and placement, the local boards will work together to develop specific strategies for recruiting new workers for each of the region's priority sectors.

Increased Collaboration with Training Providers: To meet the workforce needs for specific occupations with the four target industries, local workforce boards and other partners will collaborate more closely with community colleges, adult schools, and training providers to ensure that courses are available to address businesses' needs for trained employees and that curricula reflects industry input.

Improving the Framework for Information Sharing: As a core objective for the selected indicator is to communicate information from businesses to supply-side partners, structured protocols will be developed for sharing information through direct messaging and web-based postings. These efforts will provide a model for information sharing across the many organizations comprising Orange County's workforce development delivery system.

Strengthening Messaging to Businesses: Adopting the selected regional indicator will require the local boards and system partners to develop strong, consistent messaging around the specific strategies and services available to businesses to meet their talent sourcing and training needs.

IV. FOSTERING DEMAND-DRIVEN SKILLS ATTAINMENT

The local workforce development boards in Orange County and their workforce system partners are committed to supporting businesses of all types and sizes. However, central to the overall workforce development strategy for the region is a focus on industries that drive the economy. In addition to labor market information published by the California Employment Development, industry-specific information and intelligence are gathered from representatives of businesses in priority sectors and help to inform the content and quality of local workforce programs and regional initiatives.

A. In-Demand Industry Sectors for the Region

The Orange RPU has identified four priority sectors (or industry clusters), each with a substantial current and potential impact on the regional economy based on labor market information. Advanced manufacturing; healthcare; information and communication technology, including digital media; and retail, hospitality and tourism not only drive the county's economy but contribute to the growth and stability of other supporting businesses, industry sectors, and jobs that lead to economic self-sufficiency and advancement opportunities for Orange County residents.

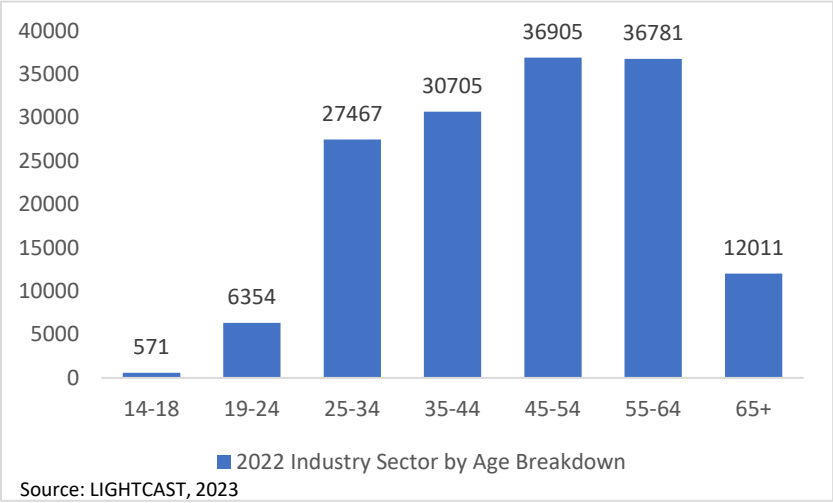
NAICS industry codes included in each sector

Industry	NAICS
Advanced Manufacturing	3241, 3251-54, 3259, 3271, 3279, 3311, 3313, 3315, 3331-3333, 3336, 3339, 3341-3346, 3351-3353
Healthcare	621,622,623
Information and Communications Technology (ICT)/Digital Media	51, 5415
Retail, Hospitality, & Tourism	44, 45, 71,72

Advanced Manufacturing

The advanced manufacturing sector has 150,795 full and part-time jobs. The average earnings per job in 2022 was $118,252. There were 5,353 payrolled manufacturing businesses in the Orange County region in 2020. Manufacturing has been declining in the region; between 2017 and 2022, the industry declined by 4%. Nationally manufacturing increased by 1% for the same period. The expected change between 2022 to 2027 is -2%, with a loss of 3,423 jobs in the region. Automation, changes in skills required to perform new tasks, import competition, and a decrease in mobility are all reasons cited as contributions to the decline. Despite the declining jobs, advanced manufacturing is a priority in the Orange RPU due to the number of jobs and the impact on the local economy, given the sector's total gross regional product (GRP) of $18.6 billion. The sector represents approximately 12.8% of the county's total GRP. The advanced manufacturing sector has highly specialized and growing advanced manufacturing subsectors in the county. Medical equipment and supplies manufacturing had a concentration in the Orange County region that is five times higher than typical in

other areas, with a location quotient of 5.72. Medical equipment and supplies manufacturing also increased jobs by 18% between 2017 and 2022, bringing the total employment in 2022 to 20,424. Other healthy and growing subsectors in the region are audio and video equipment manufacturing (LQ 4.86), apparel knitting mills (LQ 4.80), Cut and sew apparel manufacturing (LQ 4.10), manufacturing and reproducing magnetic and Optical Media (LQ 3.16), semiconductor and other electronic component manufacturing (LQ 3.11).



Source: LIGHTCAST, 2023

Manufacturing companies will need a skilled worker pipeline to fill new jobs and replace retiring workers in these specialized subsectors. Both regionally and nationally, the sector has an aging workforce. Workers 65 and older represent 8% of the workers, and 24.4% are between 55 and 64. Recruiting and retaining a high-quality workforce for new technology-driving positions will be necessary for manufacturing innovation. There are multiple opportunities at various entry points for individuals with a high school diploma, who have completed a certification program, or who have earned a 2- or 4-year college degree. The top companies posting jobs in the last 12 months were Boeing (3,340), B. Braun (1,818), Edwards Lifesciences (1,334), AbbVie (1,042), and Johnson & Johnson (890).

Healthcare

The healthcare sector has 155,883 full and part-time jobs. The average earnings per job in 2022 was $86,957. There were 11,939 payrolled business locations in the Orange County region in 2022. The industry growth between 2017 and 2022 was 10%, above the state's growth percentage of 9%. The expected change between 2022 to 2027 is 13%, with a gain of 19,906 jobs. The sector contributes $18.5 billion in GRP, equivalent to 6.1% of the county's total GRP. The healthcare sector comprises several related subsectors and supporting industries, including ambulatory healthcare services, hospitals, and nursing and residential facilities. The healthcare sector is growing and continues to be a stalwart industry throughout the pandemic. Healthcare is one of the few recession-proof industries, with registered nurses being the top-posted occupation between January 2020 to 2021[27]. This job posting trend continued between 2021 and 2022. Given the rapidly aging Orange County population, the sector is expected to be an ongoing driver of economic activity, increasing the likelihood that many residents will require more healthcare and related support services. The top companies that posted

[27] *Lightcast*, 2021, https://analyst.lightcast.io/.

jobs in the last 12 months were Providence (4,757), PIH Health (1,886), Tenet Healthcare (1,459), CareIn Home (1,408), and Kindred Healthcare (1,394).

Information and Communications Technology and Digital Media

The ICT/Digital Media (ICT) sector has 47,102 full and part-time jobs. Computer systems design services and software publishers have the highest positions in the county at 31,072 jobs combined. The average earnings for ICT jobs in 2022 were $165,034. There were 4,605 payrolled business locations in the Orange County region in 2022. The industry declined between 2017 and 2022 by 2%. Expected job growth between 2022 to 2027 is 3%, with a gain of 1,595 jobs. The sector contributes $17.2 billion in GRP, 5.6% of the county's total GRP. The technology sector accounts for a significant portion of Orange County's economic activity as economies, jobs, and personal lives become more digital and automated. The ICT sector develops innovative services and products that impact all regional industries. ICT applications can be seen in manufacturing with computer simulation and in the healthcare industry with the rise of telemedicine and telehealth. Remote work surged during the pandemic and is an enduring attribute of today's employment landscape. The ICT sector is one industry that has embraced remote work and hybrid work. The ICT industry is one of the industries where training and upskilling existing staff will be crucial in ensuring regional competitiveness. The top companies that posted jobs in the last 12 months were Disney (1,375), Verizon Communications (1,122), Anduril Industries (686), Spectrum (623), and Ingram Micro (610).

Retail, Hospitality and Tourism

The retail, hospitality, and tourism sector has 352,015 full and part-time jobs, making it the largest targeted industry in the region. The average earnings per job were $46,455 in 2022. There were 19,865 payrolled establishments in the Orange County region in 2022. The number of jobs declined by 4% between 2017 and 2022. Jobs in the state and the nation declined by 5% during the same period. The expected change between 2017 to 2022 is a growth of 9% and 32,678 job gains. The sector contributes $32.9 billion in GRP, 11% of the county's total. According to the Orange County Visitors Association, Orange County welcomed 50.2 million visitors who spent 413 billion dollars in 2019. Tourism is part of Orange County's DNA and was hit the hardest by the pandemic's effects. The sector is diverse and includes hotels, restaurants, entertainment venues, cultural attractions, sports parks, theme parks, food establishments, retail stores, and other venues. The highest numbers of jobs in 2022 were in full-service restaurants (60,044), limited-service restaurants (52,289), and amusement and theme parks (25,575). The top companies that posted jobs in the last 12 months were Marriot International (4,593), Amazon (3,020), Great Wolf Resorts (1,655), Disneyland Resort (1,621), and Starbucks (1,616).

Often the jobs within these industries are characterized by low wages. The industry has historically offered entry-level employment opportunities to new immigrants and candidates with a high school diploma. While many jobs exist in lower-paid, entry-level

classifications, there are many opportunities to secure positions offering higher compensation. The challenge is ensuring those in entry-level positions obtain additional job-specific and English-language skills necessary to qualify for promotional opportunities. Career pathway programs and incumbent worker training are workforce development strategies that can play an essential role in lifting people from lower-wage jobs.

B. Sector Strategies and Other Industry-Focused Initiatives

Orange RPU started the region's sector partnership work under a "Slingshot" grant funded by the California Workforce Development Board. The RPU engaged a consultant who is a national leader in the design and practice of next-generation industry engagement. This early work guided the launch of industry sector partnerships (ISPs) in the RPU's four priority sectors using the "Next Gen Sector Partnership" model. The first industry collaboration meetings occurred just before the COVID-19 pandemic. These meetings represented a starting point for partnerships to deepen and grow over the next several years. The RPU had participation from core partners, employers, chambers, and unions. While this work stalled over the pandemic, the Orange RPU Regional Organizer will continue to lead the sector partnership work, which has three-fold goals:

1. Conduct regular sector partnership meetings with employers to identify common industry priorities, address shared vitality issues, and understand hiring and training needs to create a pipeline of qualified candidates in growth industries and other promising sectors.

2. Develop workforce strategies in collaboration with adult education, community colleges, and other partners, including mapping career pathways, work-based learning, and apprenticeship programs.

3. Unify and coordinate business engagement efforts by all partners to minimize duplication of efforts, minimize employer fatigue, and promote systemic change that benefits each industry, its workers, and the community.

To address upward income mobility and improve economic self-sufficiency, continuous and authentic industry leadership and shifts in workforce strategies are needed to transition low-skill job seekers into middle-skill careers and address underemployment in the region. The pandemic has slowed the industry sector's work progress. The RPU remains committed to re-engaging employers and partners and building upon the industry sector work that was begun before the outbreak of COVID-19.

The RPU will work in close collaboration with the community college system through the Orange County Regional Consortium (OCRC) to convene industry leaders. OCRC provides a regional framework to communicate, coordinate, collaborate, promote, and plan career and technical education in concert with workforce and economic development in the Orange County region. OCRC represents nine community colleges and one stand-alone continuing education (noncredit) center within four community college districts. The

consortium has identified priority sectors, which are summarized below. Four of the community college sectors align with the Orange RPU priority industries. The RPU adjusted industry titles to match those of the community colleges to ensure that there is no confusion on the region's priority industries.

Priority Sectors for the OC Region

Sectors	Community Colleges	Orange RPU
Advanced Manufacturing	✓	✓
Advanced Transportation & Logistics	✓	
Life Sciences/Biotech	✓	
Business and Entrepreneurship	✓	
Energy, Construction, and Utilities	✓	
Healthcare	✓	✓
ICT/Digital Media	✓	✓
Retail, Hospitality, & Tourism	✓	✓

In partnership with OCRC, the Orange RPU will expand sector partnerships by working with Orange County chambers of commerce and other community and educational partners to identify additional core team members who will support strengthening industry sector partnerships. Orange County has many state, county, and civic organizations; four community college districts; twenty-seven K-12 school districts; California State University and the University of California systems; and numerous other public and private stakeholders vested in the workforce and economic development. Representing such a large number of stakeholders requires a great deal of commitment from the core group, which is committed to building deep, sustainable relationships that result in career pathways and a steady pipeline of workers within the identified priority sectors.

This core team will be responsible for developing and carrying out an action plan that provides a strategic and coordinated effort to unify business engagement efforts, identify and engage industry champions and other businesses, and support partner organizations. The core team will relaunch sector meetings to gather information about the challenges and opportunities. After the initial meetings, employers will be invited to regular meetings to set goals to address their needs and take action with the partners on those goals. Meetings and agendas will be business-driven, and actions taken will create a pipeline of qualified candidates who meet industry needs for in-demand occupations.

Managing sector partnerships will require a shared focus on the following:

- Training and skills development to bring new employees into specific industries and occupations
- Business development
- Incumbent worker training
- Labor market and industry research

- Restructuring work environments to improve recruitment, hiring, training, compensation, and retention strategies.
- Integrating two or more of these strategies in a multifaceted approach

C. Strategies to Communicate with Regional Employers

Most business contacts are made at the local level by the WDBs and the AJCCs. However, when the boards work with the same businesses across their jurisdictions, they make every effort to collaborate and coordinate messaging and service delivery. Such efforts have been common in rapid response, layoff aversion activities, and businesses establishing new operations in one or more Orange County communities.

To promote coordinated and cohesive messaging, the local boards have collaborated on developing a brand, Orange Workforce Alliance (OWA), to represent the RPU and regional interests and initiatives, including messaging to businesses and industry. A regional website (https://orangeworkforcealliance.com) provides an overview of services available from any of the three local boards and their partners for business customers, including human resources support, training and skills upgrading, labor market information, layoff assistance, outplacement assistance, and financial services. Launched in 2023, the OWA brand, its website, and collateral materials represent an effective strategy for communicating with employers throughout the region.

V. ENABLING UPWARD MOBILITY FOR ALL CALIFORNIANS

The local boards of the Orange RPU 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.

A. Working with Businesses that Provide Quality Jobs

The Orange RPU is committed to identifying strategies that improve the workforce system, ensuring that it enables economic growth and shared prosperity for both businesses and workers. The California Workforce Development Board defines quality jobs as employment that provide family-sustaining wages, health benefits, a pension, worker advancement opportunities, and collective worker input and jobs that are stable, predictable, safe, and free of discrimination. The local boards are attuned to the pandemic's increased impact on residents in lower-paying jobs and the increasing national attention given to those in such jobs who face inequality. The RPU and regional partners will continue to work to move unemployed and underemployed individuals, especially those with barriers to employment, into higher-paying jobs with benefits.

Before the pandemic, Orange County's unemployment numbers were historically low. Unfortunately, low unemployment did not mean all Orange County residents were thriving. Based on one adult with no children, the MIT 2023 living wage standard in Orange County is $23.66 an hour. Low-wage workers have suffered the most during the pandemic-induced recession. In 2020, 741,966 of the 1,805,612 jobs (42%) had an average wage of less than $20.00 an hour. Most of these jobs (511,322) were held by minority workers, with Hispanics holding the largest share of these lower-wage jobs (46%). Massive job losses were concentrated among lower-wage retail, hospitality and tourism, and food service workers. Although we have recovered these jobs, there are large numbers employed in areas such as food preparation and serving related occupations (143,899) that make an average of $16.34 an hour. Healthcare Support Occupations has 82,251 jobs as of 2022, with an average wage of $17.40. The boards are committed to identifying career ladders and lattices, allowing upward mobility.

The region's targeted industry sectors show potential for family-sustaining wages but are not immune to offering lower wages. Such jobs comprise a substantial portion of the Orange County regional economy, given its large retail, hospitality, and tourism footprint. While some entry-level occupations in the industry have well-articulated career pathways to a job with self-sustaining wages, each profession provides foundational skills that will better qualify individuals for enhanced employment and income opportunities. Aspen Institute's work on sectoral workforce development strategies identified two fundamental approaches to helping people connect to better employment:

1) removing barriers to good jobs for low-income people; and

2) improving the quality of jobs in key sectors where many low-income people work[28].

The RPU and regional partners understand the importance of developing strategies that accomplish both. Through industry sector work, the RPU is committed to ensuring that workforce development services and job training provide a bridge to greater financial stability.

The Orange RPU understands its role in investing in and advocating for quality jobs. The RPU will develop a standard tool for determining job quality to assess what industries, companies, and jobs to target. The region will prioritize working with employers that provide quality jobs and those interested in improving their job quality and being part of moving low-wage workers into better-paying positions. Regional partners are committed to developing protocols that focus on engaging businesses that provide quality jobs or have an interest in improving job quality. The RPU will work with business leaders to ask questions and begin conversations around job quality, helping businesses understand how workforce investments can improve their competitive advantage.

Through sector work, the RPU will work with businesses and regional partners to identify entry-level positions and develop career pathways with multiple entry and exit points, ensuring individuals understand their path to self-sufficiency. The region will review high-road employment practices and strategies to design better jobs. The RPU will also target on-the-job and incumbent worker training funding toward quality jobs that provide upward mobility.

B. Shared Target Populations and Targeted Service Strategies

The one-stop delivery system provides the local boards and partners the framework to continue and advance discussions of how workforce programs can be more effective, efficient, and aligned. The RPU and partner organizations have identified and are currently addressing the needs of shared target populations, including English language learners, justice-involved individuals, individuals with disabilities, veterans, and disconnected and foster youth. During the development of the original PY 21-24 Regional Plan and its 2023 modification, a recurring theme in planning meetings was that organizations seeking to serve these populations would benefit from stronger linkages with other organizations doing the same or complementary work.

The RPU has regularly scheduled meetings to address service delivery and performance for these targeted groups. During the regional planning meetings, the local boards and partners shared promising practices to address English language learners' specific challenges. The group discussed two distinct subcategories, those with low skills and education and those with higher skills and educational degrees from other countries. The RPU and partners committed to reconvene to discuss how we can collectively improve

[28] Maureen Conway et al., Sectoral Strategies for Low-Income Workers: Lessons from the Field (Washington, DC: Aspen Institute, October 1, 2007), https://www.aspeninstitute.org/publications/sectoral-strategies-low-income-workers-lessons-field/

service delivery to English language learners and determine if other populations warrant different workforce development strategies to serve them more effectively.

C. Equity and Ensuring Equal Access to Training and Services

The RPU and regional partners will ensure historically unserved and underserved populations have equal access to regional sector career pathways and other services and support through sector partnerships. Through sector partnership work, the RPU and partners will have the opportunity to work with employers to create career pathways that help mitigate the many challenges vulnerable populations face in completing educational goals and moving into employment with family-sustaining wages. Workforce development programs and supports should not be designed as a one-size-fits-all solution. The populations we serve are diverse, and program designs should reflect this diversity if we are going to close the skills gap and combat economic inequality. Career pathways are also a service-delivery model that can close achievement gaps and advance racial equity by helping individuals build skills over time. Career pathways are a long-term approach to serving individuals with limited basic skills or other employment barriers that the local boards are committed to expanding.

Sector partnership work will also provide an opportunity for the RPU to address issues such as degree inflation that tend to exclude minorities from jobs during the hiring process. According to Manjari Raman, director of Harvard Business School's project on Managing the Future of Work, degree inflation refers to jobs that historically required more than a high school diploma or less than a college degree but now require a college degree[29]. Explicitly requiring degrees for positions instead of the jobs' skills exacerbates the effect of racial disparities in educational achievement and eliminates workers who may have acquired the skills in other ways. Also, through sector partnership work, other hiring practices that disproportionately affect minorities, such as automatically excluding potential employees using criminal background checks and credit checks, can be discussed.

Another strategy that the sector partnerships will address is creating work-based learning programs and pre-apprenticeship programs. Pre-apprenticeships can be valuable for people of color who are historically underrepresented in apprenticeships. Work-based learning programs can provide vital formal access to employers that the population may not have had when relying on their existing professional and social networks.

Partners supporting the development of the PY 21-24 Plan and its biennial update consistently remarked on access issues, including how some lack access to nearby AJCC services and the lack of digital literacy and access to broadband services. The pandemic has exacerbated these issues. Partners describe how transportation and childcare needs, and a general lack of understanding of the services available, prevent a large percentage of those most in need of assistance from accessing them. The local boards recognize

[29] Morgan, Kate. "'Degree Inflation': How the Four-Year Degree Became Required." BBC Worklife, BBC, 28 Jan. 2021, www.bbc.com/worklife/article/20210126-degree-inflation-how-the-four-year-degree-became-required#:~:text=Cornett%20is%20a%20victim%20of,Managing%20the%20Future%20of%20Work.

that specific populations require more outreach and unique methods and strategies for locating, attracting, and retaining their participation in workforce programs. The Orange County WDB purchased a mobile unit equipped with 12 computers and a monitor outside for presentations. The mobile unit is accessible by wheelchair by using a lift. The unit serves as a one-stop mobile center for the Orange County community. The mobile unit is deployed to low-income communities, areas that are far from a comprehensive AJCC, and partner locations to increase access and awareness of services.

The boards and partner agencies will also explore additional referral agreements and processes with other organizations that can be engaged as partners to serve targeted people in their communities. Disadvantaged and vulnerable populations need increased support services, multiple service strategies, co-enrollment in additional programs, referrals to community service providers, and a team approach to succeed in the labor market.

Participants must have broadband internet access to complete enrollment applications, financial aid applications, and work requirements. Job openings are now almost exclusively accessible via the internet. Many job search websites are not fully accessible to mobile phone users. The digital divide between people with broadband internet access and those without access or cell phone-only access is also a huge barrier to accessing post-secondary education and entering the workforce. The RPU and regional partners have discussed the need for partners to address the digital divide collectively and are working with regional and statewide initiatives to address the issue.

VI. ALIGNING, COORDINATING, AND INTEGRATING PROGRAMS AND SERVICES

Orange County's three local boards have a long history of collaborating on sector strategies, and initiatives serving key groups and designing, developing, operating, and administrating successful workforce programs. WIOA's focus on regional approaches and establishing RPUs in California have strengthened collaboration among the local boards. The 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.

A. Regional Service Strategies

The three local boards have executed a Memorandum of Understanding (MOU) to solidify their joint commitment to collaboration on workforce and economic development within the Orange County region through system alignment, integration of service delivery, and leveraging resources. Regional objectives include:

- Improve and enhance customer experience by ensuring staff receives ongoing professional development training and cross-training
- Meet the needs of employers by implementing and scaling career pathways
- Improve the quality of workforce services by strengthening alignment and partner connections
- Align investments in targeted populations and industry sectors
- Expand opportunities for businesses and job seekers to engage in integrated learning and work experience activities
- Share resources and braid funding to support regional goals and objectives.

One of the clearest examples of the strong work relationship among the boards is its collaboration on not just this Regional Plan but on a Unified Local Plan. With the state's establishment of RPUs under WIOA, Orange County's local boards became responsible for developing a four-year Regional Plan as a companion to their WIOA-required Local Plans. However, given WIOA's emphasis on regional collaboration, the Anaheim, Santa Ana, and Orange County WDBs elected to develop a Unified Local Plan to represent all three local workforce development areas.

As described, to create greater recognition for their regional work, in 2023, the three boards that comprise the RPU adopted Orange Workforce Alliance (OWA) as a brand. The brand is used to promote regional partners, targeted training, labor market data, support for businesses, and workforce services for adult job seekers and youth. The primary mission of the OWA is to support the alignment of resources between the workforce, education, and industry to meet regional workforce needs.

B. Regional Administrative Cost Arrangements

The three boards in the Orange County RPU collaborate on multiple projects, with one board or another acting as the fiscal agent for each project. At present, the RPU does not have any overarching cost arrangements, nor do the local boards intend to pool funds for administrative costs.

The boards represented by the Orange RPU are determined to better align workforce services with economic development, educational institutions, and business. The boards will consider administrative cost arrangements if they determine that they will enable the RPU to accomplish the region's objectives more efficiently.

VII. PRIORITY CONSIDERATIONS FOR PROGRAM YEARS 2021-24

During the development of the original PY 21-24 Orange RPU Regional Plan, the local boards, supported by the Regional Organizer, held a series of discussions with workforce system partners, stakeholders, and community members regarding key issues affecting workforce development programs and activities throughout Orange County and that touched on central content areas of both the Regional Plan and the three boards' Local Plan. Input resulting from planning sessions was embedded throughout the original PY 21-24 Regional Plan narrative. Since implementing the Plan, these recommendations have been the ongoing focus of exploration, development, and/or enhancement.

As part of preparing the biennial update to the Plan, regional leaders again engaged system partners and others in dialog regarding major workforce issues, particularly those reflecting the widespread effects of the pandemic. These discussions resulted in recommendations for various possible strategic initiatives and priorities as summarized below.

System Approaches and Protocols

The following stakeholder suggestions deal largely with matters involving the overall workforce development delivery system in Orange County and approaches that could be addressed regionally and by one or more of the three local boards.

1. Investment in skills and information for middle school and younger students is critical in developing a pipeline of youth who are knowledgeable about and ready to participate in career pathway programs.

2. Work-based learning programs, such as apprenticeships, can be used to address job applicants' skills gaps. While businesses want experienced candidates, many applicants lack the experienced requested. A viable solution to this problem lies in employers providing the needed experience through a structured approach to skills training and skills acquisition.

3. The workforce system should provide support to businesses of all types and sizes in becoming trainers. Many businesses could benefit from providing work-based instruction to new employees but need assistance in implementing effective models.

4. The workforce system partners should more closely collaborate with the K-12 system to increase the availability of workforce preparation information and activities for students.

5. Schools, parents, and the workforce development system can better inform young people about the full range of career pathways, including jobs that don't require a college degree.

Business-Focused Strategies

Many of the stakeholders providing input during the development of the 2023 Biennial Modification to the Regional Plan addressed matters regarding the various ways in which the workforce system provides support to businesses and how the pandemic has affected the needs of businesses with regard to training, hiring, and retaining new and existing workers.

6. Workforce system partners should take a more consultative approach in working with businesses, providing advisement and recommending strategies drawn from the partners' broad experience working with both demand and supply side customers.

7. Businesses need support not just with recruitment but with job retention. Businesses are experiencing tremendous costs from newly hired workers leaving companies within the first weeks or months of employment. Workforce system partners should provide companies with tools, strategies, and recommendations for messaging.

8. While many older workers have stayed in or returned to the workforce due to the pandemic, the impending threat of a "silver tsunami" is affecting more industries and job classifications. The regional workforce system should assess the worker replacement needs of their business customers and develop industry-specific strategies to recruit and prepare a pipeline of new workers.

9. Nearly all major industries and occupations are facing worker shortages. Businesses need support from the full range of workforce system partners in addressing these shortages and developing short- and long-range strategies.

10. The use of technology by businesses accelerated during the pandemic, but training for workers in technology skills has not consistently kept pace. The system

partners should develop and implement a comprehensive strategy to address technical skills training needed by those seeking and applying for jobs.

11. Workforce system partners should assess whether they are sufficiently preparing workers for future jobs in addition to today's jobs.

12. Business services staff and organizations that support businesses in sourcing talent should assist businesses in evaluating and reassessing the requirements for jobs. For instance, is a college degree needed for many jobs requiring one? Is five years' experience an absolute requirement?

13. The workforce system's business services staff should assist companies, especially small employers, develop job descriptions. Accurate job descriptions will support businesses in more effectively messaging potential candidates about positions they want to fill.

14. By engaging more actively with all types of chambers of commerce, the workforce system can get better access to business intelligence from small businesses with unique needs.

15. Remote work and work-from-home models offer a good example of the changing workplace. The partners should identify skills needed for the new workplace and develop programs to teach these skills.

Job Seeker- and Worker-Focused Strategies

Several recommendations were received from stakeholders regarding services for job seekers and currently employed individuals.

16. Businesses are managing multi-generational workforces. Younger generations of workers have different values than their older counterparts and prioritize different aspects of their work lives. Workforce strategies should recognize and addresses generational differences in system customers.

17. While each generation of workers is entitled to its values and choices on the path within the labor market, workforce system partners should provide customers with information about the effects of frequent changes in employment on their career goals.

18. Many older workers remaining in or returning to the workforce need assistance upgrading existing skills and building new ones.

19. Workers need strong "social literacy" skills, as an essential requirement of work is building and maintaining effective relationships.

20. Workforce system partners should assist job seekers throughout their career exploration process in evaluating the “emotional quotient” of various types of work, as individuals who choose careers that align with their interests, aptitudes, and work-related values are much more likely to remain in these careers.

21. As workers’ attitudes have changed, so too have students’ values and priorities. Some students prefer in-person instruction, while others favor online courses. Education and training providers should make content available through various modalities to reach all individuals who need to develop their skills.

While the foregoing input remains relevant, leadership from the three local boards in Orange County has noted that many of the matters raised by stakeholders and community members are currently being addressed locally and regionally through various projects and initiatives. Throughout the remaining period of the PY 21-24 planning cycle, local boards, the Regional Organizer, and workforce system partners will continue to examine opportunities to address these priorities.

VIII. APPENDICES

Attachment 1: Stakeholder and Community Engagement Summary

Attachment 2: Public Comments Received that Disagree with the 2023 Biennial Modification to the Program Year 2021-24 Regional Plan

Attachment 3: Signature Page

Attachment 1

A. Stakeholder and Community Engagement Summary (Attachment 1)

To facilitate the engagement of stakeholders in planning for regional workforce development collaboration and the development of the PY 2021-2024 Regional Plan, the three local boards in Orange County hosted a series of discussions outlined in the table below.

Recommendations and other input resulting from these discussions is embedded within the content of the Orange RPU Regional Plan along with that of the local boards' PY 21-24 Unified Local Plan.

Mode of Outreach	Target of Outreach	Summary of Attendance	Comments
Email, phone, social media, local board websites, Eventbrite	WIOA Core Program Partners	76 individuals registered and 43 attended	The meeting was well attended by representatives from several core partner agencies. We had representatives from the local boards, adult schools, community colleges, conservation corps, job corps, community-based organizations, and housing authorities, EDD.
Email, phone, social media, local board websites, Eventbrite	CalFresh Employment and Training Partners	38 individuals registered and 27 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, Orange County Social Services Agency.
Email, phone, social media, local board websites, Eventbrite	Child Support Services Partners	27 individuals registered and 18 attended	The meeting was attended by representatives from the local boards, community colleges,

Mode of Outreach	Target of Outreach	Summary of Attendance	Comments
			community-based organizations, Orange County Social Services Agency.
Email, phone, social media, local board websites, Eventbrite	Competitive Integrated Employment Partners	34 individuals registered and 28 attended	The meeting was attended by representatives from the local boards, community colleges, ROP programs, Goodwill Industry, City of Irvine Disabilities, and other community-based organizations.
Email, phone, social media, local board websites, Eventbrite	English Language Learners Partners	22 individuals registered and 19 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, adult schools.
Email, phone, social media, local board websites, Eventbrite	Re-Entry Services Partners	40 individuals registered and 24 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, State Parole, Orange County Sheriff, Mental Health Services
Email, social media, local board websites, Eventbrite	Community at large, Businesses, Chambers, Core Partners	66 individuals registered and 33 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, adult schools, Veteran Serving Organizations, EDD,

Mode of Outreach	Target of Outreach	Summary of Attendance	Comments
			State of California WSB.

During the development of the biennial update to the Regional Plan, the local boards hosted a community and stakeholder forum on "*The Role of the Workforce System in Economic Recovery*." This forum was held in-person on November 17, 2022.

Mode of Outreach	Target of Outreach	Summary of Attendance	Comments
Email, phone, social media, local board websites, Eventbrite	WIOA Core Program Partners, Community Members, Community Based Organizations, Education Partners	56 registered and 39 attended	The meeting was attended by representatives from several core partner agencies. We had representatives from the local boards, adult schools, community colleges, community-based organizations, and EDD.

Attachment 2

B. Public Comments Received that Disagree with the 2023 Biennial Modification to the PY 21-24 Regional Plan

The Orange Regional Plan was posted online for a 30-day public comment period.
There were no public comments received that disagreed with the regional plan.

Attachment 3

C. SIGNATURE PAGE

ORANGE PLANNING UNIT REGIONAL PLAN

The 2023 Regional Plan Modification represents the Orange Regional Planning Unit efforts to maximize and coordinate resources available under Title I of the Workforce Innovation and Opportunity Act. This Regional Plan Modification is submitted for the period July 1, 2023, through June 30, 2025, in accordance with the provisions of WIOA.

LOCAL BOARD CHAIRS

ORANGE COUNTY WORKFORCE DEVELOPMENT BOARD

Signature

Teri Hollingsworth

Name

Chair, Orange County Workforce Development Board

Title

Date

ANAHEIM WORKFORCE DEVELOPMENT BOARD

Signature

Joe Paquette

Name

Chair, Anaheim Workforce Development Board

Title

Date

SANTA ANA WORKFORCE DEVELOPMENT BOARD

Signature

Daisy Campos

Name

Chair, Santa Ana Workforce Development Board

Title

Date

LOCAL ELECTED OFFICIALS

COUNTY OF ORANGE BOARD OF SUPERVISORS

Signature

Donald Wagner

Name

Chair, Orange County Board of Supervisors

Title

Date

CITY OF ANAHEIM COUNCIL

Signature

Ashleigh Aitken

Name

Mayor, City of Anaheim

Title

Date

CITY OF SANTA ANA COUNCIL

Signature

Valerie Amezcua

Name

Mayor, City of Santa Ana

Title

Date

2023 BIENNIAL MODIFICATION TO THE

UNIFIED LOCAL PLAN

Program Year 2021-2024

AWDB ANAHEIM WORKFORCE DEVELOPMENT BOARD

OC WORKFORCE DEVELOPMENT BOARD

Overseeing job seekers, youth and business programs and services.

SANTA ANA WORKFORCE DEVELOPMENT BOARD

Anaheim Workforce Development Board
Contact: Marco Lucero
Phone: (714) 765-4341
Email: mlucero@anaheim.net

Orange County Workforce Development Board
Contact: Carma Lacy
Phone: (714) 480-6420
Email: carma.lacy@occr.ocgov.com

Santa Ana Workforce Development Board
Contact: Deborah Sanchez
Phone: (714) 565-2621
Email: dsanchez@santa-ana.org

TABLE OF CONTENTS

I. INTRODUCTION AND OVERVIEW 1

II. WIOA CORE AND REQUIRED PARTNER COORDINATION 3

A. Coordination with AJCC Partners and WIOA Memorandum of Understanding 3

B. Partners' Efforts to Collaborate on Co-Enrollment and Case Management 8

C. One-Stop System's Use of Technology and Other Remote Strategies 10

D. Coordination of Workforce Activities and Support Services 11

E. Physical and Programmatic Accessibility for Individuals with Disabilities 11

III. STATE STRATEGIC PARTNER COORDINATION 12

A. Coordination with County Human Services Agency and Other Local Partners That Serve Individuals Accessing CalFresh Employment and Training Services 12

B. Coordination with Local Child Support Agency and Other Local Partners Serving Individuals That Are Non-Custodial Parents 13

C. Coordination with Local Partnership Agreement Partners Established in Alignment with the Competitive Integrated Employment Blueprint and Other Local Partners That Serve Individuals with Developmental and Intellectual Disabilities 14

D. Coordination with Community-Based Organizations and Other Local Partners That Serve Individuals Who Are English Language Learners, Foreign Born, and/or Refugees 16

IV. WIOA TITLE I COORDINATION 17

A. Staff Training and Professional Development to Increase Digital Technology Skills 17

B. Frontline Staff Training and Professional Development to Increase Cultural Competency and Effectiveness in Working with Individuals and Groups that Have Been Exposed to Trauma 17

C. Coordination of Rapid Response and Layoff Aversion Activities 18

D. Services and Activities Available under WIOA Title I Adult and Dislocated Worker Programs 19

E. Services and Activities Available under WIOA Title I Youth Program 23

F. Entity Responsible for Disbursal of Grant Funds and the Competitive Process Used to Award Contracts for WIOA Title I Activities 25

G. How the Local Board Fulfills the Duties of the AJCC Operator and/or the Career Services Provider or Selection of AJCC Operators and Career Services Providers 25

V. STAKEHOLDER INPUT AND CONSIDERATIONS FOR PY 21 - 24 26

VI. APPENDICES 28

A. Stakeholder and Community Engagement Summary (Attachment 1) 29

B. Public Comments Received that Disagree with the 2023 Biennial Modification to the PY 21-24 Local Plan (Attachment 2) 32

C. SIGNATURE PAGE (Attachment 3) 33

I. INTRODUCTION AND OVERVIEW

In accordance with the requirements of the Workforce Innovation and Opportunity Act (WIOA) of 2014 and guidance published by the California Workforce Development Board (CWDB) and Employment Development Department (EDD), the three local workforce development boards (WDBs) in Orange County developed a four-year Local Plan covering program years (PYs) 2021-2024. Following approval by state officials representing the Governor, the Plan became effective from July 1, 2021, through June 30, 2025. This PY 21-24 Local Plan update constitutes its WIOA-required biennial modification. Following the approval of this modification by state representatives, it will become the official, active version of the Plan beginning on July 1, 2023, and remain in effect through June 30, 2025.

Local Workforce Development Boards in Orange County and the Unified Local Plan

Orange County is served by two municipal boards, Anaheim WDB, and Santa Ana WDB, representing the most populated cities with more than 300,000 residents. The Orange County WDB serves the balance of Orange County, which includes 32 incorporated cities and more than two dozen unincorporated areas. Home to more than 3 million people, Orange County is the third most populous county in California and the sixth most populous in the nation. Businesses within the county's vibrant and diverse economy employ more than 1.5 million workers.

In 2015, as WIOA was implemented as the core program of the nation's workforce development system, new opportunities arose for collaboration among local boards within labor market regions defined by the Governor. Orange County was designated as one such region in California, officially known as the Orange Regional Planning Unit (RPU). With this designation, the three local boards in Orange County became responsible for developing a four-year Regional Plan as a companion to their WIOA-required Local Plans. However, given WIOA's emphasis on regional collaboration, the Anaheim, Santa Ana, and Orange County WDBs elected to develop a Unfiied Local Plan representing all three local workforce development areas. This effort by the three boards has been recognized as one of California's best examples of regional workforce development collaboration.

Development of the Local Plan and the Biennial Modification

Development of the original PY 21-24 Local Plan resulted from three local boards' significant engagement with organizations and individuals throughout Orange County that guide, contribute to, and benefit from workforce system services. A series of partner and stakeholder discussions were held. These are summarized in Attachment 1 to this Plan. Preparing the Plan also involved reviewing and evaluating existing partnerships, services, and systems and identifying areas that can be strengthened. The boards' senior leadership led the planning process, assisted by the Regional Organizer, who supports the joint efforts of the boards. Once the Plan was completed, it was made available for public review and comment before being forwarded to the CWDB for review.

During the biennial process to update the PY 21-24 Local Plan, the three WDBs utilized a similar strategy and, again, engaged stakeholders, the community, and workforce development board members in discussions about strengthening the system's services.

Impact of the COVID-19 Pandemic on the PY 21-24 Unified Local Plan

The development of the original PY 21-24 Unified Local Plan was affected by the onset of COVID-19, the ensuing public health crisis, and the myriad effects of the pandemic on businesses, schools, government operations, and the local workforce development delivery system. The influence of the pandemic on the planning process in late 2020 and early 2021 was undeniable, as its shaped stakeholders' views about the economy, the workforce, training, and virtually every aspect of the workforce system.

By the time the 2023 biennial modification to the Unified Local Plan was being developed, circumstances had changed significantly. While COVID remains a concern, the economy and communities have re-opened. The re-opening of the economy has shifted the focus of local workforce systems as they address evolving priorities in meeting the needs of job seekers and businesses. The three WDBs and their workforce system partners are keenly aware of changing customer attitudes, perceptions, needs, and priorities. Strategies corresponding to these changes have been embedded throughout this 2023 updated version of the Plan.

II. WIOA CORE AND REQUIRED PARTNER COORDINATION

The Workforce Innovation and Opportunity Act includes requirements for local boards to establish a framework for collaboration among state and local programs financially supported by nineteen distinct federal fund sources. Six of these programs constitute the four "core partners:" the WIOA Title I Adult, Dislocated Worker, and Youth Programs; the WIOA Title II Adult Education and Family Literacy Act Program; the WIOA Title III Wagner-Peyser Act Program; and the WIOA Title IV State Vocational Rehabilitation Services Program. The core partners and thirteen other federally supported programs make up the WIOA-mandated one-stop partners. Each of the local boards has entered into a Memorandum of Understanding (MOU) with the organizations managing all federal partner programs at the local level. The narrative that follows describes coordination with the core and other required program partners as prescribed by WIOA.

A. Coordination with AJCC Partners and WIOA Memorandum of Understanding

Over the last four decades, the three local boards in Orange County have built solid and effective relationships with state and local agencies representing the One-Stop partner programs. Throughout the remaining period of the Local Plan, the WDBs look forward to further enhancing coordination with each workforce system partner.

Following are local organizations representing the WIOA core and required partner programs that are party to the MOU for each of the three local boards in Orange County.

Orange County WDB	
Federal Partner Programs	***MOU Partner***
WIOA Title I Adult WIOA Title I Dislocated Worker WIOA Title I Youth	Orange County Workforce Development Board
WIOA Title II Adult Education and Literacy	North Orange County Continuing Education Huntington Beach Adult School
WIOA Title III Wagner-Peyser	Employment Development Department
WIOA Title IV Vocational Rehabilitation	California Department of Rehabilitation (DOR)
Carl Perkins Career Technical Education	North Orange County Continuing Education
Title V Senior Community Service Employment Program (SCSEP)	SER – Jobs For Progress
Job Corps	Long Beach Job Corps Center
Native American Programs (WIOA Section 166)	United American Indian Involvement
Migrant and Seasonal Farmworkers (WIOA Section 167)	*Not applicable. Program is not present in local area.*
Jobs for Veterans State Grants	Employment Development Department
Youth Build	Long Beach Job Corps
Trade Adjustment Assistance (TAA)	Employment Development Department
Community Services Block Grant	Community Action Partnership of Orange County
Housing and Urban Development E&T	OC Housing Authority - FSS
Unemployment Insurance (UI)	Employment Development Department
Second Chance Act Grantee	None in the local area

Temporary Assistance for Needy Families (TANF)/CalWORKs	County of Orange, Social Services Agency (SSA)

Santa Ana WDB	
Federal Partner Programs	***MOU Partner***
WIOA Title I Adult WIOA Title I Dislocated Worker WIOA Title I Youth	Orange County Workforce Development Board
WIOA Title II Adult Education and Literacy	Santa Ana College Rancho Santiago Community College District
WIOA Title III Wagner-Peyser	Employment Development Department
WIOA Title IV Vocational Rehabilitation	California Department of Rehabilitation
Carl Perkins Career Technical Education	Santa Ana College
Title V Senior Community Service Employment Program (SCSEP)	SER – Jobs For Progress
Job Corps	Long Beach Job Corps Center
Native American Programs (WIOA Section 166)	United American Indian Involvement
Migrant and Seasonal Farmworkers (WIOA Section 167)	*Not applicable. Program is not present in local area.*
Jobs for Veterans State Grants	Employment Development Department
Youth Build	Long Beach Job Corps Center
Trade Adjustment Assistance (TAA)	Employment Development Department
Community Services Block Grant	Community Action Partnership of Orange County
Housing and Urban Development E&T	Santa Ana Housing Authority
Unemployment Insurance (UI)	Employment Development Department
Second Chance Act Grantee	None in the local area
Temporary Assistance for Needy Families (TANF)/CalWORKs	County of Orange, Social Services Agency

Anaheim WDB	
Federal Partner Programs	***MOU Partner***
WIOA Title I Adult WIOA Title I Dislocated Worker WIOA Title I Youth	Orange County Workforce Development Board
WIOA Title II Adult Education and Literacy	North Orange County Continuing Education Huntington Beach Adult School
WIOA Title III Wagner-Peyser	Employment Development Department
WIOA Title IV Vocational Rehabilitation	California Department of Rehabilitation (DOR)
Carl Perkins Career Technical Education	North Orange County Continuing Education
Title V Senior Community Service Employment Program (SCSEP)	SER – Jobs For Progress
Job Corps	Long Beach Job Corps Center
Native American Programs (WIOA Section 166)	United American Indian Involvement
Migrant and Seasonal Farmworkers (WIOA Section 167)	*Not applicable. Program is not present in local area.*
Jobs for Veterans State Grants	Employment Development Department
Youth Build	Long Beach Job Corps Center
Trade Adjustment Assistance (TAA)	Employment Development Department
Community Services Block Grant	Community Action Partnership of Orange County
Housing and Urban Development E&T	Anaheim Housing Authority
Unemployment Insurance (UI)	Employment Development Department
Second Chance Act Grantee	None in the local area

Temporary Assistance for Needy Families (TANF)/CalWORKs	County of Orange, Social Services Agency

The local boards and their partners coordinate the delivery of services and resources described in each board's MOU, which delineates each partner's responsibilities with regard to supporting the planning, development, and implementation of programs and services as part of the local America's Job Centers of California (AJCC) system. The MOU is a functional tool that outlines how the boards and AJCC partners work together to create a unified service delivery system that meets their shared customers' needs. The MOU is reviewed and updated every three years, and a corresponding infrastructure funding agreement and other system costs are reviewed annually.

Local boards hold AJCC partner meetings regularly, ranging from monthly to quarterly. Participation in these meetings helps strengthen the partnership across programs and works to improve the system's effectiveness to meet the needs of both job seekers and business customers. The meetings provide a platform for partners to review performance, shared goals, and address issues that impact service delivery. Partner meetings are also used for information sharing and to cross-train staff to increase understanding of resources available in the AJCC system. The local boards and partner organizations share the responsibility of providing professional development training to staff.

Several co-located partners are in the AJCCs, enabling them to collaborate more effectively and avoid duplication of services. As necessary, staff from partner agencies interface with clients and support WIOA-funded case managers in developing individual employment plans that may include partner agency services. They also participate in general orientations, host client workshops, support clients in the resource room, and support on-site hiring events. Core, required, and other partners organizations and programs are co-located at AJCCs administered by each of the three local boards as follows:

Orange County WDB AJCCs: EDD, DOR, County of Orange Office on Aging, and the City of La Habra. Career Teams, LLC, the contracted career services provider, and America Works, the contracted AJCC Operator, are also located at the AJCCs.

Santa Ana WDB AJCC: EDD, DOR, SER Jobs for Progress, SSA, Housing Authority, and City-administered youth programs (SAY Youth and CA4All).

Anaheim WDB AJCC: EDD, DOR, SSA, Working Wardrobes, and North Orange Continuing Education.

Outreach efforts that support the AJCC programs are shared among partners. Partner agencies promote each other's programs to job seekers in the community to increase exposure to workforce development system services. AJCC partners also assist in staffing the Orange County WDB's One-Stop mobile unit, enabling them to reach more individuals in the community. AJCC partners coordinate service delivery to business customers that support the training and retention of a skilled workforce. Coordination involves identifying and designing appropriate business solutions, engaging businesses

in sector strategies, participating in rapid response events, and preemptive layoff aversion activities. Partners also support the promotion of work-based learning programs to the business community.

Other Strategic Partnerships

The one-stop service delivery system's core and mandated partners outlined in WIOA provide critical support to the AJCCs and are an integral part of the workforce development system in Orange County. However, in addition to these the public programs, a wide range of local organizations and programs are essential workforce system partners, as they provide an array of services and support that benefits job seekers, workers, and businesses. Broadly, such partners fall into three categories: labor, business-serving agencies, and community-based organizations (CBOs). The following is a summary of the many ways in which these local partners contribute to and enrich Orange County's workforce development delivery system.

Partnerships with Organized Labor

The labor movement and the public workforce development system have long shared common interests in supporting workers and candidates for employment in developing skills; securing employment with good wages, benefits, and security; and in building careers with mobility, clear paths to advancement, and opportunities to earn family supporting wages and achieve a middle class standard of living. With the implementation of WIOA as the nation's principal source of public funding for development of the workforce, opportunities for collaboration between the WIOA-mandated partner programs and organized labor have increase in several ways, including the following:

Representation of "Worker Voice" on Local Workforce Development Boards: Local boards provide oversight of and set a strategic direction for the WIOA-funded local workforce system. They benefit from a membership that is representative of different disciplines and perspectives. WIOA requires that no less than 20 percent of the members of each local WDB represent the workforce, with two of more or such members representing organized labor. The Orange County, Santa Ana, and Anaheim WDBs have strong and supportive representation from local unions and other labor representatives. Across the three local boards are members representing the International Brotherhood of Electrical Workers (IBEW); United Food and Commercial Workers (UFCW); California School Employees Association (CSCA); United Union of Roofers, Waterproofers, and Allied Workers; Laborers Union (LiUNA); and the Orange County Labor Federation, which represents dozens of local unions from every sector of the labor movement. The individuals representing organized labor on the three labor boards bring unique insight into issues affecting workers and provide information and support for connecting workforce system customers to labor represented jobs and careers.

Outreach and Providing Information to Individuals Seeking Employment and Exploring Careers: Local labor organizations are effective partners in supporting the workforce system in recruiting candidates for jobs and training. One example of such coordination

is the series of activities occurring during national Apprenticeship Week. Annually, the County, in partnership with the local WDBs, the Orange County Labor Federation, AFL-CIO, the Los Angeles/Orange County Building and Construction Trades Council, and the International Brotherhood of Electrical Workers host OC National Apprenticeship Week events. During Apprenticeship Week, the partners host a series of presentations by and discussions with registered apprenticeship champions to showcase their successes and demonstrate how registered apprenticeship programs help build up the country's workforce to address pressing issues that include: responding to climate change, modernizing cybersecurity responses, addressing public health concerns, and rebuilding the country's infrastructure. The workforce and labor partners also highlight how registered apprenticeships provide a viable career path for everyone, including women, people of color, and persons with disabilities. Additionally, these events provide apprentices a platform to share their experiences and how participation in apprenticeships have transformed their lives.

Provide Job-Specific Skills Training through Registered Apprenticeships and Structured Pre-Apprenticeship Training Programs: Labor organizations, particularly local unions representing the construction trades, have an expansive history of using apprenticeships to provide work-based learning that results in workers developing certified, industry-recognized skills. A wide range of apprenticeships are available to job seekers in Orange County, including much sought after opportunities, such as apprenticeships offered by the IBEW. Throughout Orange County, local WDBs can also connect WIOA participants and other workforce system customers to various multi-craft core curricula (MC3) construction pre-apprenticeship training programs, which are operated under the oversight of the Los Angeles/Orange County Building and Construction Trades Council.

Partnerships with Business-Serving Agencies and Programs

Equal in importance to job seekers as customers are businesses. Therefore, the workforce development boards of Orange County frequently collaborate with local organizations that focus on providing services to businesses of all types and sizes, including companies representing the key industries that are identified as priority target sectors within the Orange County Regional Planning Unit's PY 21-24 Regional Plan and its 2023 Biennial Update.

Given their close relationships and ongoing interactions with local businesses, chambers of commerce are uniquely positioned to support local enterprises. Chambers make introductions to businesses leaders, inform the workforce system of new and expanding companies, and frequently serve as liaisons between local businesses and the WDBs. While the system partners work with dozens of chambers of commerce, local boards have developed particularly effective relationships with the chambers in Irvine, Santa Ana, and Anaheim.

To assist businesses customers, the local WDBs also work with the Orange County Inland Empire Small Business Development Center Network, which offers business consulting, training, and online courses at no cost to entrepreneurs and business owners throughout

Orange, Riverside, and San Bernardino counties. The centers are funded in part by the U.S. Small Business Administration (SBA). The lead center is based in Orange County and is hosted by the College of Business and Economics at California State University, Fullerton.

Through the boards' connection to the SBDC, they are building a relationship with the Small Business Diversity Network (SBDN), a non-profit organization that supports small businesses throughout Orange County that are owned by minorities, women, veterans, LGBTQ individuals, and people with disabilities.

Partnerships with Community-Based Organizations

Over the last four decades, each of the three WDBs in Orange County has developed close and effective relationships with non-profit and community-based organizations. Such organizations are an integral part of the fabric of workforce development service delivery in the County, providing a vast array of services that supplement those offered under WIOA, by the core and required partner programs, and through other publicly-funded initiatives. Not only do CBOs fill gaps in services offered by public programs, they frequently function as community on-ramps to the AJCCs and other agencies that comprise the workforce development system by providing information and referrals.

Among the many non-profit agencies and CBOs with which the local boards collaborate, the following organizations have notably strong ties with the workforce system: Orange County United Way, OC Goodwill, 211 Orange County, Working Wardrobes, OC Conservation Corps, Hope Builders, Project Kinship, Orange County Children's Therapeutic Arts Center, and Chrysalis.

Detailed information on the programs, services, and resources of organized labor, business-serving, and community-based organizations that are foundational partners of the Orange County workforce system can be found online at Orange Workforce Alliance (OWA) website: https://orangeworkforcealliance.com/. OWA represents the programs and interests of the three Orange County-based local workforce boards, along with those of many workforce system partners.

B. Partners' Efforts to Collaborate on Co-Enrollment and Case Management

Local boards support the integration of service delivery within the AJCC system, including strategic co-enrollment and common case management strategies. The boards maintain strong partnerships with organizations committed to collaborating to increase service integration, as appropriate, for the local areas' needs and for improving participant experiences. These practices allow partners to leverage limited resources and eliminate duplication of services. Case management is a shared responsibility among partners serving joint customers. CalJOBS, the statewide MIS system for WIOA and other programs administered by EDD, facilitates communication between partners and documents participant activities, outcomes, and referrals.

During intake, case managers determine if participants can benefit from services provided through more than one partner program. The intake process includes participants' authorization to release information that allows sharing of specific information among partners. Co-located partners use a common enrollment application to assess basic eligibility across multiple programs. System partners are cross-trained and knowledgeable on eligibility and program offerings of numerous programs, enabling them to make appropriate referrals and helping participants navigate and access resources across partner programs.

Examples of co-enrollment strategies include enrolling individuals from priority and target populations in two or more programs for which they are eligible and that address unique areas of need. Co-enrollment may include enrolling veterans in WIOA Title I and the state-funded VEAP program or federally-funded veterans services administered by community-based partners. WIOA eligible individuals who are English language learners also often participate in WIOA Title II services through which they receive ESL and other essential skills training. Job seekers with disabilities may be served by a range of local partner programs, such as DOR, Goodwill, and the AJCC.

Through community and stakeholder meetings, including those held in support of the development of the original PY 21-24 Unified Local Plan, the local boards identified the following areas where improvements could be made with regard to integrated service delivery and a seamless customer experience:

- Increase cross-training on WIOA programs and services, including community college and adult school frontline staff.
- Regularly schedule cross-training sessions to ensure staff knowledge of partner programs and services is current and new staff members are trained.
- Improve the bi-directional referral process between local boards and all system partners to improve communication and outcome tracking by: 1) increasing CalJOBS referral system usage by system partners or review other systems recently adopted by partner agencies; and 2) providing training to system partners on CalJOBS referrals.
- Continue Orange County Leadership Council meetings, but create working groups of partner organizations to address system issues that impede a seamless customer experience.

As the biennial update to the Local Plan was being developed, representatives of the local boards noted that progress had been made on the foregoing objectives, particularly in the area of training for workforce system partner staff. As training needs are ongoing and constantly evolving, the boards will prioritize the delivery of various training during regularly scheduled partner meetings and ad hoc sessions, as necessary.

Community and stakeholder input gathered during the process of preparing the Biennial Modification to the PY 21-24 Unified Local Plan cuts across various Plan topics and is, therefore, summarized in Section V.

C. One-Stop System's Use of Technology and Other Remote Strategies

In March 2020, the local boards' modified operations due to the COVID-19 pandemic. Santa Ana and Orange County AJCC/One-Stop Centers were accessible in-person (by appointment) and through virtual services. Anaheim WDB provided phone and virtual services to clients and collaborated with the Anaheim Central Library to support clients who needed access to computers and additional in-person support. The local boards are again providing in-person services at their AJCCs.

Hybrid strategies, a combination of in-person and virtual services, have become the norm. Following the expansion of virtual services during the pandemic, the boards clearly recognized that many individuals prefer to access services without going into a one-stop career center location. Virtual service delivery is also effective for many individuals with barriers, such as transportation and childcare. However, the local boards acknowledge that virtual service delivery poses obstacles for individuals who struggle with technology and do not have access to a computer or broadband service. The three WDBs are collaborating with various initiatives at all levels of government to decrease the digital divide.

Before the pandemic, the Orange County WDB began the development of a comprehensive virtual One-Stop Center. While work on the project was somewhat slowed during the pandemic, a fully functioning virtual AJCC will be available by late 2024. The virtual one-stop delivery system will use a customized learning management system (LMS) that provides local boards and AJCC partners with a single system for the online delivery of services. The LMS system will help jobseekers access job search assistance, training, and essential support services from any location. Businesses will be able to conduct virtual hiring events and remotely access AJCC support. The system provides significantly expanded access for Orange County residents, including those in remote areas.

Services provided online during the pandemic are still available via the web and in-person under the hybrid approach. Such services include orientations, workshops, and rapid response events. AJCC educational partners continue to provide instruction online. Workforce development system partners have also developed a blended model that includes online and in-person service delivery. Some of the boards and AJCC partners provide hardware resources, including internet hotspots, laptops, and Chromebooks, to program participants, while others make these tools available at their facilities or accessible community-based locations.

Another effective strategy for making workforce services widely accessible is the Orange County WDB's use of a wheelchair-accessible mobile unit that functions as a One-Stop on wheels. The mobile unit has twelve computers and a monitor on the outside used for outdoor orientations and workshops. It is available for the boards and system partners to use to serve the community. The unit is regularly dispatched to community events,

libraries, partner agencies, and parks. It is also used to reach targeted communities and areas of Orange County that are not near a comprehensive AJCC.

D. Coordination of Workforce Activities and Support Services

The local boards have an aligned supportive services policy that outlines the coordination of resources and services. Supportive services provide participants with assistance such as childcare, bus passes, gas cards or mileage reimbursement, work attire, occupational license fees, school supplies, and work tools. These services enable participants to engage in WIOA career and training activities. Case managers work directly with clients to address barriers to participating in programs and services, including barriers that can be mitigated through supportive services. If the case manager determines a need and supportive services cannot be obtained through other programs, WIOA Title I funds can be used to provide the support.

The local boards work with AJCC partners and other community organizations to identify support services resources. The demand often exceeds the budgets of the local boards. Customers are referred to other organizations to obtain such services before the boards' limited support services are expended. The supportive services most needed are childcare, transportation assistance, and work attire. Examples of local partners that can provide support to various customers groups served by the AJCCs include, but are not limited to, DOR (accommodations and tools to support workplace environments); Community Health Initiative of Orange County (access to publicly-supported health insurance programs); Chrysalis (specialized counseling services); Goodwill of Orange County (ASL interpreting services); and Working Wardrobes (business attire and work-appropriate clothing).

E. Physical and Programmatic Accessibility for Individuals with Disabilities

The Orange County, Santa Ana, and Anaheim WDBs comply with WIOA Section 188 and the applicable provisions of the Americans with Disabilities Act (ADA) of 1990. All AJCC/One-Stop Centers are accessible, and various assistive technology devices are available for those who have a physical, visual, or hearing impairment. However, the local boards and partners recognize that more resources are needed and that acquiring additional assistive technology tools is a goal of the Local Plan.

The local boards and AJCCs ensure all locations meet ADA requirements through the Biennial Local Area Self-Assessment checklist. The local boards also ensure that all eligible training providers meet the necessary standards for participants to access training. The boards comply by following the nondiscrimination and equal opportunity procedures outlined in WSD17-01. More specifically, the boards ensure the following:

- Contracts, cooperative agreements, job training plans, and policies and procedures contain nondiscrimination assurances.
- The AJCC/One-Stop Centers provide initial notice and continuing notice that they do not discriminate by posting the required "Equal Opportunity is the Law" poster with the

EEO contact information for filing a complaint. Postings are in prominent places in the centers and on the websites.
- Nondiscrimination information is provided during verbal presentations, including participant orientations.
- Enrolled clients sign a nondiscrimination form maintained in the participant's file.
- All staff members are provided with nondiscrimination policy information and training upon hire. Orange County repeats the training annually, and Santa Ana and Anaheim staff repeat the training every two years.
- Program flyers and program communication contain an EEO and auxiliary aid and services statement.

As the local boards look to strengthen services for customers with disabilities, they will coordinate with their counterparts at DOR and continue to seek the department's guidance on accessibility, facility layout, and assistive technology, along with training to increase staff effectiveness in working with job seekers with disabilities. In addition, the boards will rely on disability services and resources asset mapping that the Thompson Policy Institute at Chapman University led.

III. STATE STRATEGIC PARTNER COORDINATION

In 2018, the State completed and published a biennial modification to California's Unified Strategic Workforce Development Plan for Program Years 2016-2019. CWDB identified several new strategic partnerships with state-level agencies and initiatives within this modification. Guidance issued by the State Board in 2018 to local boards regarding two-year modifications to their PY 2017-2020 Plans required that WDBs pursue these partnerships within their jurisdictions. In the 2019 modification to the Local Plan, the WDBs in Orange County described these local-level relationships, some of which were in an early stage of development. Following is a summary of the evolution of these strategic partnerships and approaches under consideration to further strengthen collaboration with local providers and programs.

A. Coordination with County Human Services Agency and Other Local Partners That Serve Individuals Accessing CalFresh Employment and Training Services

The boards and co-located AJCC partners are committed to working with Orange County SSA to improve labor market outcomes for all recipients of CalFresh, including, but not limited to, participants in CalFresh Employment & Training Services (CalFresh E&T). Under SSA's design for the Orange County CalFresh E&T program, participation is mandatory for employable individuals who receive General Relief (GR). The GR program provides temporary cash aid in the manner of a loan to eligible indigent adults who do not have custody of any minor children and do not qualify for federal- or state-funded cash aid programs. The CalFresh E&T program is not currently available to other CalFresh recipients. CalFresh E&T participants participated in work experience programs at worksites developed by SSA staff before the COVID-19 pandemic. The California Department of Social Services (CDSS) collaborated with Cell-Ed to provide welfare to work and CalFresh E&T program participants with the opportunity to receive education

and training online to build skills and engage in countable CalFresh participation hours (20 hours monthly) while sheltering during the COVID-19 pandemic. This model has fulfilled an immediate program need during the pandemic.

As service delivery in all public programs returns to pre-pandemic formats, the CalFresh E&T program is transitioning back to its original structure. As such, the three WDBs and their workforce system stakeholders are prepared to assist participants with the full range of workforce services available through WIOA and partner programs.

The local boards provide priority service to recipients of public assistance. Before the COVID-19 pandemic, the local boards were finalizing the program design and referral process for CalFresh E&T participants. SSA requires tracking of participant attendance in staff monitored job search and other WIOA program activities. Historically, AJCCs have not tracked hours and attendance except for WIOA-funded training programs. A process to track hours and attendance was established and can be implemented at the request of SSA.

To strengthen the partnership and improve outcomes for the target population, the boards and SSA have agreed to the following:

- Implement a program and referral process and move forward with referrals to the AJCC for those CalFresh E&T participants who elect to be served through the AJCC instead vs. other options.
- SSA will ensure all CalFresh E&T participants receive information regarding employment services under WIOA and the local workforce system partners.
- Provide SSA frontline staff training on the programs and services available through the one-stop delivery system's staff and partners.
- The boards, SSA, and community-based organizations will research program models and discuss the possibility of expanding the CalFresh E&T program to additional CalFresh recipients by engaging partners that can provide a non-federal match.

B. Coordination with Local Child Support Agency and Other Local Partners Serving Individuals That Are Non-Custodial Parents

Anaheim, Santa Ana, and Orange County boards, co-located partners, and the Orange County Department of Child Support Services (DCSS) formal partnership arrangement was established during the WIOA local plan modification process in 2018. A bi-directional referral and consent process was established and is the current method used to refer non-custodial parents to the AJCC's. After instituting the partnership, the boards provided in-person and online training to 136 DCSS staff to ensure staff members understood WIOA programs and the new referral process. In addition to the training provided, the workforce board and DCSS managers met monthly to discuss program success and improvement opportunities. The partners will continue to meet monthly to discuss opportunities to improve the labor market outcomes of unemployed, underemployed, and payment-delinquent non-custodial parents. The partnership has initially experienced moderate success, with 131 referrals to the AJCCs. Of those non-custodial parents

referred, 58% of them had driver's license holds released due to participation in the WIOA program. However, since the onset of the pandemic, services have stalled, and referrals ceased. The local workforce boards are invested in the relationship with DCSS and are anxious to return to pre-COVID processes and referrals.

To strengthen the partnership and improve outcomes for the target population, the boards and DCSS are committed to the following:

- Grow participant referrals by focusing on outreach planning and new strategies to promote the program to a broader population of non-custodial parents.
- AJCC staff will provide additional training to frontline DCSS staff on WIOA eligibility and detailed program information.
- AJCC staff will work with DCSS staff to develop WIOA talking points for frontline DCSS staff to utilize in discussing WIOA services with non-custodial parents.
- DCSS will train AJCC frontline staff on how to address concerns non-custodial parents express about going to work. Training will address the DCSS goal not to be a barrier to the non-custodial parent's employment goals and the tools they have available to modify child support orders.
- AJCCs will work with DCSS to develop a separate referral process for justice-involved non-custodial parents to the prison-to-employment (P2E) program.
- DCSS will participate in the Orange County Leadership council bi-monthly meetings so the partnership can develop a broader range of support and participation from other community-based organizations and education providers.
- Board staff will explore additional options to provide workshops to non-custodial parents who are English language learners. DCSS serves a large population of Spanish-speaking and Vietnamese-speaking non-custodial parents who could benefit from career workshops taught in their native languages. AJCC staff currently offers language-specific services on a one-on-one basis to individuals, as necessary. The centers do not currently offer language-specific workshops.

As the biennial modification was being prepared, the local boards agreed to explore opportunities with DCSS to co-locate staff within the AJCCs to facilitate immediate handoffs to workforce service staff after non-custodial parents meet with DCSS representatives.

C. Coordination with Local Partnership Agreement Partners Established in Alignment with the Competitive Integrated Employment Blueprint and Other Local Partners That Serve Individuals with Developmental and Intellectual Disabilities

In 2018, the California Department of Education, DOR, and the California Department of Developmental Services developed the Competitive Integrated Employment (CIE) Blueprint, which is a five (5)-year plan to assist people with intellectual disabilities and development disabilities (ID/DD) prepare for and secure a job earning at least minimum wage working in the community with people without disabilities. The goals of the Blueprint are to:

- Help the three state departments work together to better support people with ID/DD who want a CIE job.
- Create more options for people with ID/DD to prepare for and get a CIE job.
- Help people with ID/DD to make their own choices about working in the community.

The CWDB and EDD issued guidance to local boards on the development of 2019 biennial modifications to four-year Local Plans. This guidance required that local boards connect with and seek to participate in the efforts of local partners (local education agencies, the DOR district office, and the regional center) to deliver CIE services as outlined in a Local Partnership Agreement (LPA). These agreements articulate how local partners will work together to streamline service delivery, engage their communities, and increase CIE opportunities for individuals with ID/DD. LPAs provide a framework for the local partners to determine strategies that will work best for them and the populations they serve.

CIE is defined in WIOA as full-time or part-time work at minimum wage or higher, with wages and benefits similar to those without disabilities performing the same work, and fully integrated with co-workers without disabilities. The Act requires that states ensure employment is offered as a priority outcome for people ID/DD. In furtherance of state and federal laws, programs that provide sheltered workshops and other aggregate work settings for people with ID/DD are being phased out. They are moving to competitive integrated employment, eliminating sub-minimum wage jobs.

The local boards in Orange County coordinate workforce development services with the agencies that are signatories to a Local Partnership Agreement (LPA) and other local partners that serve individuals with ID/DD. The local board representatives participate in the Orange County LPA meetings with the signatory partners and community-based organizations. The partnership has created new employment and training opportunities aligned with WIOA and CIE Blueprint initiatives.
The local boards and DOR also work together to engage businesses through participation in chamber events, diversity job fairs, and other network business events. Another initiative is the training and development of resources for helping persons with disabilities better understand their role in searching for, securing, and retaining competitive, gainful employment. This course is taught to frontline staff at the local AJCCs and partner organizations that are a part of the Orange County Leadership Council.

To strengthen the partnership with the LPA partners and improve overall outcomes for the CIE target population and other individuals with disabilities, the boards, DOR, core partners, and community-based organizations are committed to the following:

- DOR will expand student services to the One-Stop Centers for eligible youth program participants.
- DOR will provide local board frontline staff with cross-training and professional development to ensure they understand DOR's vast offerings.

- Local boards and DOR will improve "closing the loop" on referrals and consider using the CalJOBS referral system to provide referral feedback.
- Increase participant referrals by focusing on targeted outreach and identifying other community-based organizations serving the target population.

As stated in section II of this Plan, the board's efforts in this area continue to be informed by asset mapping on disability services and resources developed by the Thompson Policy Institute at Chapman University.

D. Coordination with Community-Based Organizations and Other Local Partners That Serve Individuals Who Are English Language Learners, Foreign Born, and/or Refugees

The local boards have long-standing and effective partnerships with the community colleges and adult education partners in the Orange County region. The Rancho Santiago, South Orange County Regional, North Orange County Regional, and Coast consortia serve a diverse population of English language learners, foreign-born individuals, and refugee students. During the development of the original PY 21-24 Unified Local Plan, the local boards held an online discussion regarding services to these target groups. The session allowed educators, community-based organizations, and other stakeholders to share ideas and offer recommendations. The conversation helped all parties better understand how to address gaps that exist for these priority populations.

To strengthen partnerships and improve outcomes for the target population, the boards, education agencies, and community organizations committed to the following:

- Local boards will examine whether the OC Leadership Council meeting should be reformatted. The board will consider hosting smaller workgroups to address the targeted population's needs.
- Local boards will work with the educational providers to develop a program plan to improve support for individuals who have degrees from other countries that will: 1) reduce confusion by helping individuals navigate the process of obtaining college transcript translation and course equivalency review by colleges, ensuring they do not start, unnecessarily, from ground zero; and 2) provide funding that individuals need to pay for transcript translation and review.
- Help the target population understand how their existing skills can be used in the workplace and explore how work-based learning programs can support them in demonstrating their skills and abilities while learning new skills on the job.
- Deploy the Orange County mobile One-Stop unit to the community colleges and adult education locations to improve outreach and access for the communities that do not have a comprehensive One-Stop close to them.
- Local boards will provide training to teachers and instructors on WIOA programs and services.

During the development of the 2023 update to the Local Plan, representatives of the three WDBs reported that significant progress had been made on the foregoing objectives. This

progress includes, but is not limited to, the adoption of processes to assist immigrants in securing recognition of foreign transcripts; increased availability of web-based AJCC and workforce services system information in the seven core languages of Orange County; access to basic career services to interested individuals regardless of their immigration status; increased availability of ESL courses online; co-location of immigrant-focused partners and programs at the AJCCs; and collaboration between local boards and SSA on serving newly arrived refugees.

IV. WIOA TITLE I COORDINATION

The following narrative addresses services, activities, and administrative requirements of for the three local workforce boards in Orange County under the WIOA Title I formula programs, along with strategies for staff preparation, training, and ongoing professional development to effectively respond to participant needs.

A. Staff Training and Professional Development to Increase Digital Technology Skills

The onset of the pandemic and stay-at-home orders resulted in staff using more digital tools out of necessity. These immediate changes dictated that local boards move quickly, and individual staff members adopted many tools with very little training or direction. All staff members were required to use technology and were digitally literate before the pandemic, and as they engaged in immersive learning, they achieved greater digital fluency. The local boards provide an environment that allows staff time for self-directed learning with online videos created for product use. Frontline staff mastered products and delivered and produced training videos to help their co-workers gain knowledge. Staff assisted their colleagues in navigating new digital tools.

Digital fluency is a foundational aspect of productivity, enabling staff to perform more effectively. Since the current plan's implementation, digital skills training provided to staff has covered: Microsoft Office 365; videoconferencing platforms, including Zoom and MS Teams; and a series of CalJOBS training sessions. Additional training in digital skills will be provided to frontline staff during the remaining period of the PY 21-24 Unified Local Plan.

B. Frontline Staff Training and Professional Development to Increase Cultural Competency and Effectiveness in Working with Individuals and Groups that Have Been Exposed to Trauma

Orange County's population is racial and ethnically diverse, which is reflected in the customers who use AJCC services. In addition, workforce system staff estimates that a significant number of the customers they see may have experienced various forms of trauma based on vulnerable groups that they represent, along with the wide-ranging traumatic effects of the pandemic.

Staff training and professional development are a high priority for the local boards. The local boards and AJCC partners work together to provide frontline staff training. The Orange RPU has a training plan that includes a host of topics. The Orange RPU has successfully collaborated with partners and other organizations and leveraged training in the region. Any training hosted by the local board is open to partner staff and organizations in the Orange County Leadership Council. Training planned over the remaining period of the Local Plan includes, but is not limited to: cultural competency, trauma-informed care, motivating and building staff capacity, and sector strategies.

C. Coordination of Rapid Response and Layoff Aversion Activities

The Anaheim, Santa Ana, and Orange County Workforce Development Boards continue to support statewide rapid response activities by providing rapid response and layoff aversion services to businesses and outplacement services to dislocated workers in the region. Rapid Response teams offer services to employers and workers affected by layoffs and mass closures in the Orange County region. The rapid response team is made aware of large layoffs through California's Worker Adjustment and Retraining Notification (WARN) system. Local boards also receive notice of smaller layoffs from AJCC partners, chambers of commerce, industry association meetings, and news outlets.

The rapid response team includes the local board, EDD, education and training providers, and community-based organization staff. Local board staff is responsible for making initial and follow-up contact with employers and coordinating with partner agencies to organize rapid response events. The three boards coordinate rapid response events when a large regional employer has notified them of a mass layoff that affects residents throughout Orange County. If businesses in adjacent workforce areas are affected, the Orange County boards also coordinate with WDB staff in these areas. The local boards' rapid response teams have developed a common rapid response presentation that ensures they deliver a consistent message throughout the county. The teams also participate in Southern California Rapid Response Roundtable meetings.

Local boards also assist businesses at risk of displacing employees by providing layoff aversion services. The boards receive businesses' referrals and use the Econovue system to identify at-risk companies for targeted layoff aversion services. Rapid response and layoff aversion services include:

- Online or on-site outplacement services for affected workers
- Coordination with EDD on Trade Adjustment Assistance and Work Sharing programs
- Customized training or incumbent worker training
- Conducting individual needs assessment of companies' "business retention" needs
- Assistance with securing tax credits, incentives, and cost-containment programs
- Coordination of utility and technology services
- Assistance in accessing public financing programs (local, state, and federal) and Industrial Development Bonds
- Identification of traditional financing opportunities

- Assistance with obtaining California Employment and Training Panel (ETP) funding to assist in upgrading the skills of existing workers
- Coordinating with educational and job training institutions to satisfy the precise skills needs of one or more businesses

The Santa Ana WDB contracts with the local Chamber of Commerce to provide layoff aversion services and has established benchmarks for the completion of needs surveys that may indicate distress in a company that requires aversion strategies. Business outreach that supports layoff aversion is targeted to companies in growth industries and other key sectors.

Outplacement services for workers that have been affected by a layoff are provided to workers. Affected workers are made aware of these services through online and on-site rapid response events. The rapid response teams support laid-off workers in quickly accessing resources such as unemployment insurance, health insurance, and rollovers for retirement plans. Also, laid-off workers are provided information on WIOA-funded career and training services.

D. Services and Activities Available under WIOA Title I Adult and Dislocated Worker Programs

WIOA Title I Adult and Dislocated Worker employment and training activities offered through the AJCC system include a comprehensive array of employment and career services, such as career exploration workshops, classroom training, on-the-job training, transitional job opportunities, and other work-based learning opportunities, such as apprenticeships.

AJCC/One-Stop Delivery System

Brick-and-mortar AJCC facilities include those listed below. These sites are complemented by virtual services, which are a critical part of the hybrid workforce development delivery system that all three local boards have adopted in Orange County.
Orange County WDB AJCCs

Orange County Workforce Solutions Center
7077 Orangewood Ave., Ste. 200
Garden Grove, CA 92841

OC4Vets - Veterans Reemployment Office
1300 S. Grand Avenue, 2nd Floor, Building B
Santa Ana, CA 92705

Los Alamitos Joint Forces Training Base
11200 Lexington Dr. Bldg. 244
Los Alamitos, CA 90720

Supplementing the above facilities is the Orange County WDB mobile AJCC, which provides services from community and business locations throughout the county.

The OCWDB will relocate the Garden Grove AJCC to Brea by June 2023. In addition, a new site will open in South Orange County in Laguna Hills in 2023.

Santa Ana WDB AJCC

Santa Ana WORK Center
801 West Civic Center Drive, Suite 200
Santa Ana, CA 92701

Anaheim WDB AJCC

Anaheim Workforce Connection
201 South Anaheim Blvd.
Anaheim, CA 92805

Adult and Dislocated Worker Program Services

The three local boards offer a wide range of services for job seekers enrolled in the WIOA Title I Adult and Dislocated Worker programs. Services meet the needs of individuals with various levels of education and work experience and job seekers from vulnerable populations who may have one or more barriers to employment. Services are designed to prepare participants for entry-level and higher positions with businesses in and around Orange County, particularly businesses within the priority sectors that are identified in the Orange RPU PY 21-24 Regional Plan.

The AJCC system offers three levels of career services: Basic Career Services, Individualized Career Services, and Training Services. These are supplemented by follow-up services. Services are provided in no specific sequence. Instead, services are tailored to meet the needs of individuals while still allowing for tracking outcomes for reporting purposes.

Basic Career Services: Basic Career Services are made available to all individuals and include:

- Outreach, intake, and orientation to services that are available to all job seekers
- Determinations of eligibility for WIOA. Individuals who do not meet WIOA eligibility criteria may continue accessing basic career services and be referred to partner programs and other community-based agencies
- Initial assessments of skill levels are conducted that address literacy, numeracy, and English language proficiency, as well as aptitudes, abilities, and supportive service needs

- Labor market information, including job vacancy listings, information on in-demand industry sectors and occupations, regional labor market information, and information on nontraditional employment
- Partner information and referrals are based on individual needs and requests from customers
- Training provider Information includes data on performance and costs of programs offered by eligible providers of training services, adult education, and career and technical education
- Assistance in establishing eligibility for programs such as financial aid for training and education programs not provided under WIOA
- Supportive services information, including types, limits, and sources
- Unemployment insurance information assistance for filing unemployment compensation claims

Individualized Career Services: These services are provided when needed for an individual to obtain or retain employment. AJCC staff relies principally on assessments to determine the need for and appropriateness of individualized career services. Included are:

- Job readiness workshops
- Skills assessments
- Individual employment plans: These customized plans are developed through an in-depth interviewing and evaluation process to identify employment barriers and appropriate employment goals. The Plan outlines activities to attain career objectives.
- Group or individual counseling
- Transitional jobs
- Financial literacy services are provided based on individual needs
- Supportive services, including services such as transportation, childcare, uniforms, and tools required for employment
- English language acquisition and integrated education and training programs are provided based on individual need
- Job search and placement assistance

Training Services: The boards provide access to a wide range of training programs, which fall broadly into two types: institutional (classroom) training programs, and work-based training programs, which are developed directly with employers and include activities such as on-the-job training and customized training. Incumbent worker training may also be provided to employed individuals to increase or upgrade their skills. Training modalities include:

- Occupational skills training, including training for nontraditional employment
- On-the-job training
- Incumbent worker training
- Programs that combine workplace training with related instruction, which may include cooperative education programs

- Training programs operated by the private sector
- Skill upgrading and retraining
- Entrepreneurial training
- Transitional jobs
- Adult education and literacy activities
- Customized training conducted with a commitment by an employer

Follow-Up Services

For 12 months, follow-up services may be provided to participants, including technical skills training, counseling, mentoring, crisis intervention, life skills, or emergency support required to sustain long-term employment.

Examples of innovative and promising features of services available through the AJCC system include:

- Comprehensive Employment Services: Career counseling and tools for job search preparation include training referrals, job listings, resume preparation assistance, interview workshops, access to on-site employer recruitments, and labor market information.

- Career Pathway Programs: Career pathway programs have a clear sequence, or pathway, of education coursework and may include stackable training credentials aligned with employer-validated work readiness standards and skills. AJCCs offer programs that include a full range of post-secondary education options that may involve attending programs at local adult education, community colleges, and private educational institutions. As appropriate for the individual, Career pathway programs combine occupational skills training with adult education services, give credit for prior learning, and adopt other strategies that accelerate the participant's educational and career advancement.

- Collaboration with Apprenticeship Programs: Santiago Canyon Community College (SCC) is one of the leading community colleges in Orange County that offers apprenticeship and journeyman training in various trades. The local boards make referrals to SCC for apprenticeship programs. The local boards plan to work closer with SCC to explore additional partnership opportunities for pre-apprenticeship programs. The boards are also working with the California Department of Industrial Relations Division of Apprenticeship Standards to explore opportunities to support the development of nontraditional apprenticeship programs.

The local boards have policies and adhere to the requirements of priority of service. Priority is given to veterans (and spouses), recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient. Priority of service is established during intake and eligibility. AJCC operators' staff have been trained on the priority of service requirements, and the priority status is documented in CalJOBS. AJCC

partners are informed of the local board's priority of service policy, and they assist in referring individuals that meet the priority of service criteria.

E. Services and Activities Available under WIOA Title I Youth Program

The local boards serve eligible in-school and out-of-school youth through contracted service providers and partner organizations, assisting them in their career exploration, planning, education, and skills development. Youth with disabilities are served by providers serving all other youth, with the exception of in-school youth with disabilities under the jurisdiction of the Orange County WDB, who may be served under a specialized contract with Goodwill Industries of Orange County.

WIOA Title I Youth programs include the following fourteen required program elements:

1. Tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies
2. Alternative secondary school services, or dropout recovery services, as appropriate
3. Paid and unpaid work experiences with academic and occupational education as a component of the work experience
4. Occupational skills training
5. Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster
6. Leadership development opportunities
7. Supportive services
8. Adult mentoring
9. Follow-up services for no less than 12 months after the completion of participation
10. Comprehensive guidance and counseling
11. Financial literacy education
12. Entrepreneurial skills training
13. Services that provide labor market and employment information about in-demand industry sectors or occupations available in Orange County
14. Activities that help youth prepare for and transition to post-secondary education and training

The ratio of in-school to out-of-school youth served by the local boards is:

WDB	*In-School Youth*	*Out-of-School Youth*
Orange County WDB	25%	75%
Santa Ana WDB	20%	80%
Anaheim WDB	0%	100%

Core services and features of WIOA youth services available in the Orange County region include the following:

Case Management: Case managers provide youth guidance, support, and motivation while enrolled in the program and working toward their education, training, and

employment goals. Case managers work with youth to develop an Individual Service Plan (ISP), which identifies the employment goals and the comprehensive services strategy provided to the participant by the One-Stop Center and AJCC partner agencies. Case managers maintain contact with participants and monitor their progress toward achieving goals in the ISP. If necessary, the case manager modifies the ISP in response to the participant's progress. The case manager also coordinates services with other AJCC partners that are part of the youth's comprehensive service strategy.

Work Experience: The local boards and AJCC partners provide work experience opportunities for youth to support their gaining workplace skills. Work experience may be a paid or unpaid activity. Work experience is a planned, structured learning experience in a workplace for a limited time. Youth may be placed at a private for-profit sector, non-profit sector, or public sector worksite. Youth work experiences opportunities may include:

- Pre-apprenticeship programs
- Summer employment and other employment activities available throughout the school year
- Internships and job shadowing
- On-the-job training

Through the Orange County WDB, youth can participate in earn-and-learn programs such as "Youth with Impact." This program is a live, online "mini-MBA" program that equips participants with entrepreneurship skills, confidence, and business knowledge.

Job Readiness Training: Local boards and AJCC partners provide youth with opportunities to gain employability skills or job readiness training to prepare youth for employment or work experience opportunities. Youth gain these skills through structured activities and workshops.

Occupational Skills Training: Short-term occupational skills training is a program activity that may be offered to youth participants. Occupational skills training programs provide specific vocational skills and must lead to an industry-recognized certificate.

Educational Services: Local boards and AJCC partners provide educational services that include tutoring, basic education skills training, ESL training, and instruction that leads to a high school diploma or its equivalent.

Support Services: Youth are provided support services when necessary to enable their participation in other WIOA activities. Supportive services include, but are not limited to, linkages to community services, transportation assistance, childcare assistance, and work attire and work-related tools. As occurs for Adult and Dislocated Worker program participants, the local boards prioritize the use of non-WIOA funds for support services.

Digital Literacy Skills for Youth: Youth services moved to online platforms during the pandemic. Many youth participants adapted well to the online model with youth providers' support. In recent years, the local boards have been working to strengthen collaboration

with the public library system. The boards have leaned on their library partners to support workforce development services through their offerings, including digital literacy programming, computer classes, online homework assistance through Brainfuse Help Now, resume assistance and career coaching through Brainfuse Job Now, and dropout recovery services for youth and adults. AJCC staff also connect youth to adult education and community college non-credit programs, which provide digital literacy programming.

F. Entity Responsible for Disbursal of Grant Funds and the Competitive Process Used to Award Contracts for WIOA Title I Activities

The County of Orange serves as the Orange County Workforce Development Board's fiscal agent and bears responsibility for grant funds' disbursal. Similarly, the City of Santa Ana serves as the Santa Ana Workforce Development Board's fiscal agent and bears responsibility for grant funds' disbursal. The City of Anaheim serves as Anaheim's Workforce Development Board's fiscal agent and bears responsibility for grant funds' disbursal.

The three local boards use a competitive procurement process to award sub-grants and contracts for WIOA Title I activities when award amounts are above the threshold required for such operations. The local boards follow local competitive procurement policies and procedures adopted by their respective governments. These written policies adhere to state and federal procurement regulations. In addition, the local boards comply with all requirements specified in EDD Directive WSD17-08 with respect to the procurement of equipment and related services.

G. How the Local Board Fulfills the Duties of the AJCC Operator and/or the Career Services Provider or Selection of AJCC Operators and Career Services Providers

Consistent with EDD Directive WSD19-13, the selection of AJCC operators and career services providers for the local boards is the result of open and competitive procurement processes. The Santa WDB and Anaheim WDB have been granted approval by state representatives acting on behalf of the Governor to function as the career services provider for the WIOA Title I Adult and Dislocated Worker programs.

The following tables summarize the functions and roles of the entities each board has a contractual relationship with:

Local Board	*Provider*	*Role*
Orange County	America Works	One-Stop Operator
	Career Team, LLC	Career Services Provider
	City of La Habra	Youth Services "Ready. Set. OC" Program
	Goodwill Industries of Orange County	Youth Services for in-school youth with disabilities

Anaheim	Pending renewed procurement	One-Stop Operator
	Anaheim WDB	Career Services Provider
	Hope Builders	Youth Services
	Orange County Conservation Corps	Youth Services
Santa Ana	Pending renewed procurement	One-Stop Operator
	Santa Ana WDB	Career Services Provider
	Orange County Children's Therapeutic Arts Center	Youth Services
	Project Kinship	Youth Services
	Orange County Conservation Corps	Youth Services

V. STAKEHOLDER INPUT AND CONSIDERATIONS FOR PY 21 - 24

Based on discussions held throughout the process used to develop the original PY 21-24 Local Plan, recommendations were made by workforce system partners and other stakeholders about various topics. This input was woven into the Plan narrative.

As the three local boards worked to prepare the biennial update to the Local Plan, stakeholders were again engaged in discussion about the system. From this input, the following were identified as priorities for further exploration, development, and/or enhancement by the WDBs and system partners over the remaining period of the PY 21-24 Local Plan.

- With jobs seekers and businesses expressing a broad range of preferences regarding service modalities, the workforce system should provide as may options as possible, including brick-and-mortar career centers, virtual services, and community-based services options, such as community access points (e.g. partner facilities) and mobile services.

- Ensure that virtual services are of the same quality and have parallel content to in-person services delivered at the AJCCs.

- Digital literacy is essential for all job seekers and is required to do most jobs. The workforce system should assess each customer's digital literacy and provide training in this area to ensure everyone has the basic skills to compete for and succeed in employment.

- AJCCs need to prepare job seekers to participate successfully in online interviews, which may require different skills and strategies than traditional in-person interviews.

- To expand programs available to job seekers and to make training more accessible, make more online training programs and courses available.

- Recognizing the emotional toll of the pandemic, the workforce system should collaborate with organizations providing mental health services.

- AJCC and workforce development system partner organizations should implement trauma-informed approaches to service delivery.

- Orange County has a large immigrant community that needs support in preparing for and finding work. Specialized approaches and strategies are required to assist individuals from this underserved group of job seekers.

- Individuals needing training may be overwhelmed by the variety of institutions, programs, and courses available in Orange County. Using "navigators" may help job seekers determine the best service options.

- The county is diverse in terms of those needing workforce development assistance. Customized approaches may be the best strategy for meeting the needs of various target groups.

- Information about AJCC services and workforce system partner programs should be available in the native languages most frequently spoken in Orange County.

- Outreach to job seekers and businesses should leverage the full range of social media resources as they reach a wide audience at no cost.

- Web-based resources need to be accessible to and easy to navigate for people with disabilities.

- Expanding virtual services for businesses will enable the workforce system to reach many companies in the county.

VI. APPENDICES

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

Attachment 1

A. Stakeholder and Community Engagement Summary

To facilitate the engagement of stakeholders in planning for the local workforce development delivery system and in the development of the PY 2021-2024 Local Plan, the local boards hosted a series of discussions outlined in the table below.

Recommendations and other input resulting from these discussions in embedded within the content of the Unified Local Plan.

Mode of Outreach	Target of Outreach	Summary of Attendance	Comments
Email, phone, social media, local board websites, Eventbrite	WIOA Core Program Partners	76 individuals registered, and 43 attended	The meeting was well attended by representatives from several core partner agencies. We had representatives from the local boards, adult schools, community colleges, conservation corps, job corps, community-based organizations, and housing authorities, EDD.
Email, phone, social media, local board websites, Eventbrite	CalFresh Employment and Training Partners	38 individuals registered, and 27 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, Orange County Social Services Agency.
Email, phone, social media, local board websites, Eventbrite	Child Support Services Partners	27 individuals registered and 18 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, Orange County Social Services Agency.

Mode of Outreach	Target of Outreach	Summary of Attendance	Comments
Email, phone, social media, local board websites, Eventbrite	Competitive Integrated Employment Partners	34 individuals registered and 28 attended	The meeting was attended by representatives from the local boards, community colleges, ROP programs, Goodwill Industry, City of Irvine Disabilities, and other community-based organizations.
Email, phone, social media, local board websites, Eventbrite	English Language Learners Partners	22 individuals registered and 19 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, adult schools.
Email, phone, social media, local board websites, Eventbrite	Re-Entry Services Partners	40 individuals registered and 24 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, State Parole, Orange County Sheriff, Mental Health Services
Email, social media, local board websites, Eventbrite	Community at large, Businesses, Chambers, Core Partners	66 individuals registered and 33 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, adult schools, Veteran Serving Organizations, EDD, State of California WSB.

During the development of the biennial update to the Local Plan, the local boards hosted a community and stakeholder forum on "Hybrid Service Delivery." This forum was held in-person on November 30, 2022.

Mode of Outreach	Target of Outreach	Summary of Attendance	Comments
Email, phone, social media, local board websites, Eventbrite	WIOA Core Program Partners, Community Members, Community Based Organizations, Education Partners	47 registered and 25 attended	The meeting was attended by representatives from several core partner agencies. We had representatives from the local boards, adult schools, community colleges, community-based organizations, and EDD.

Attachment 2

B. Public Comments Received that Disagree with the 2023 Biennial Modification to the PY 21-24 Local Plan

The Anaheim, Santa Ana, and Orange County Unified Local Plan were posted online for a 30-day public comment period. **There were no public comments received that disagreed with the regional or unified local plans.**

Attachment 3

C. SIGNATURE PAGE

ORANGE COUNTY UNIFIED LOCAL PLAN

The unified local Plan represents the Orange Regional Planning Unit efforts to maximize and coordinate resources available under Title I of the Workforce Innovation and Opportunity Act. This unified local Plan is submitted for the period July 1, 2021, through June 30, 2025, in accordance with the provisions of WIOA.

LOCAL BOARD CHAIRS	LOCAL ELECTED OFFICIALS
ORANGE COUNTY WORKFORCE DEVELOPMENT BOARD	**COUNTY OF ORANGE BOARD OF SUPERVISORS**
Signature	**Signature**
Teri Hollingsworth	Donald Wagner
Name	**Name**
Chair, Orange County Workforce Development Board	Chair, Orange County Board of Supervisors
Title	**Title**
Date	**Date**
ANAHEIM WORKFORCE DEVELOPMENT BOARD	**CITY OF ANAHEIM COUNCIL**
Signature	**Signature**
Joe Paquette	Ashleigh Aitken
Name	**Name**
Chair, Anaheim Workforce Development Board	Mayor, City of Anaheim
Title	**Title**
Date	**Date**
SANTA ANA WORKFORCE DEVELOPMENT BOARD	**CITY OF SANTA ANA COUNCIL**
Signature	**Signature**
Daisy Campos	Valerie Amezcua
Name	**Name**
Chair, Santa Ana Workforce Development Board	Mayor, City of Santa Ana
Title	**Title**
Date	**Date**

The REAL Work of Workforce Boards

By Bob Lanter

cwa california workforce association

How Do You Describe the Work you do for the Orange County WDB?

cwa california workforce association

Pittsburg, CA

cwa
california workforce association

The Beginning....

"I doubt whether working on your tan can be counted as seasonal employment."

© Rina Piccolo.

Gunman Obsessed With Ex-Boss / Cops say he took her hostage, forced her to shoot him

Published 4:00 am PST, Wednesday, March 27, 1996

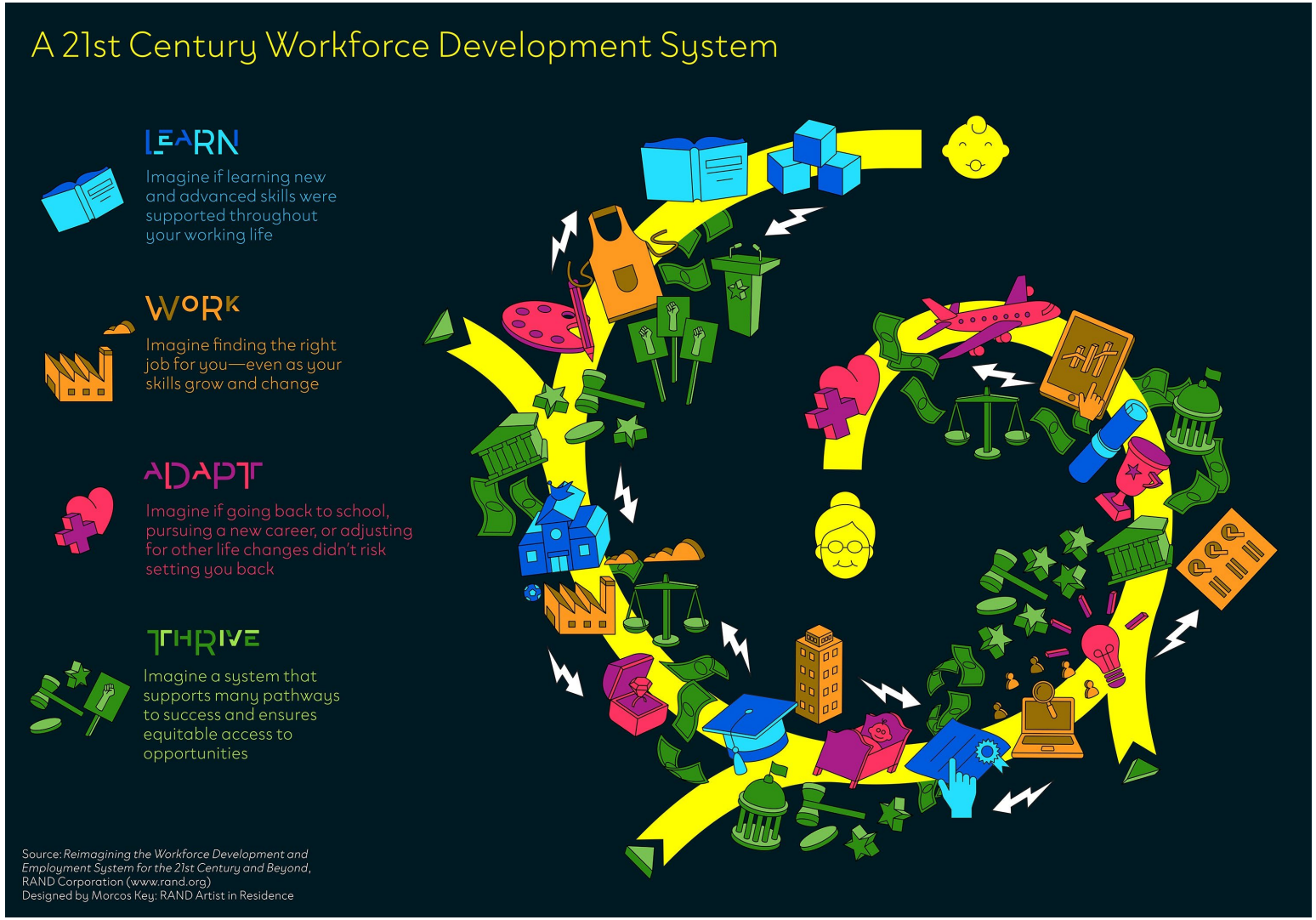
*Jociel Galamay Bulawin believed that **Mary McIntyre** was controlling his dreams, so he took her hostage and forced her to live out a nightmare, authorities said yesterday.*

In a bizarre episode played out in a Concord trophy store on Monday, Bulawin forced McIntyre to put a pistol to his head and to pull the trigger. Doing so ended a horrifying five-hour ordeal during which he repeatedly threatened to kill her if she didn't kill him first.

*"It was a fatal attraction," said Concord police spokesman **Maurice Jennings**. "He felt she controlled his life, that she was a psychic and had this power over him and his destiny. It's very surreal."*

SF GATE

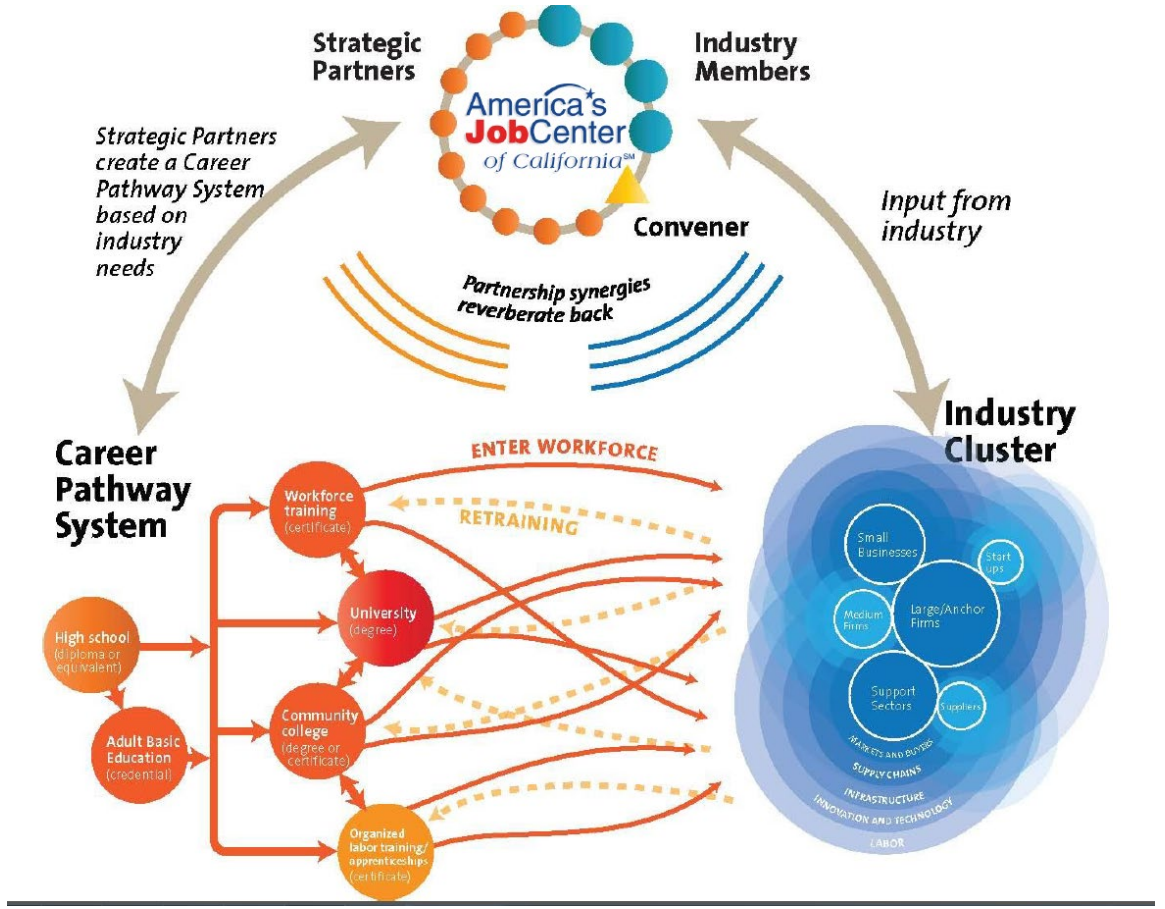
Why is Workforce Development so Important?

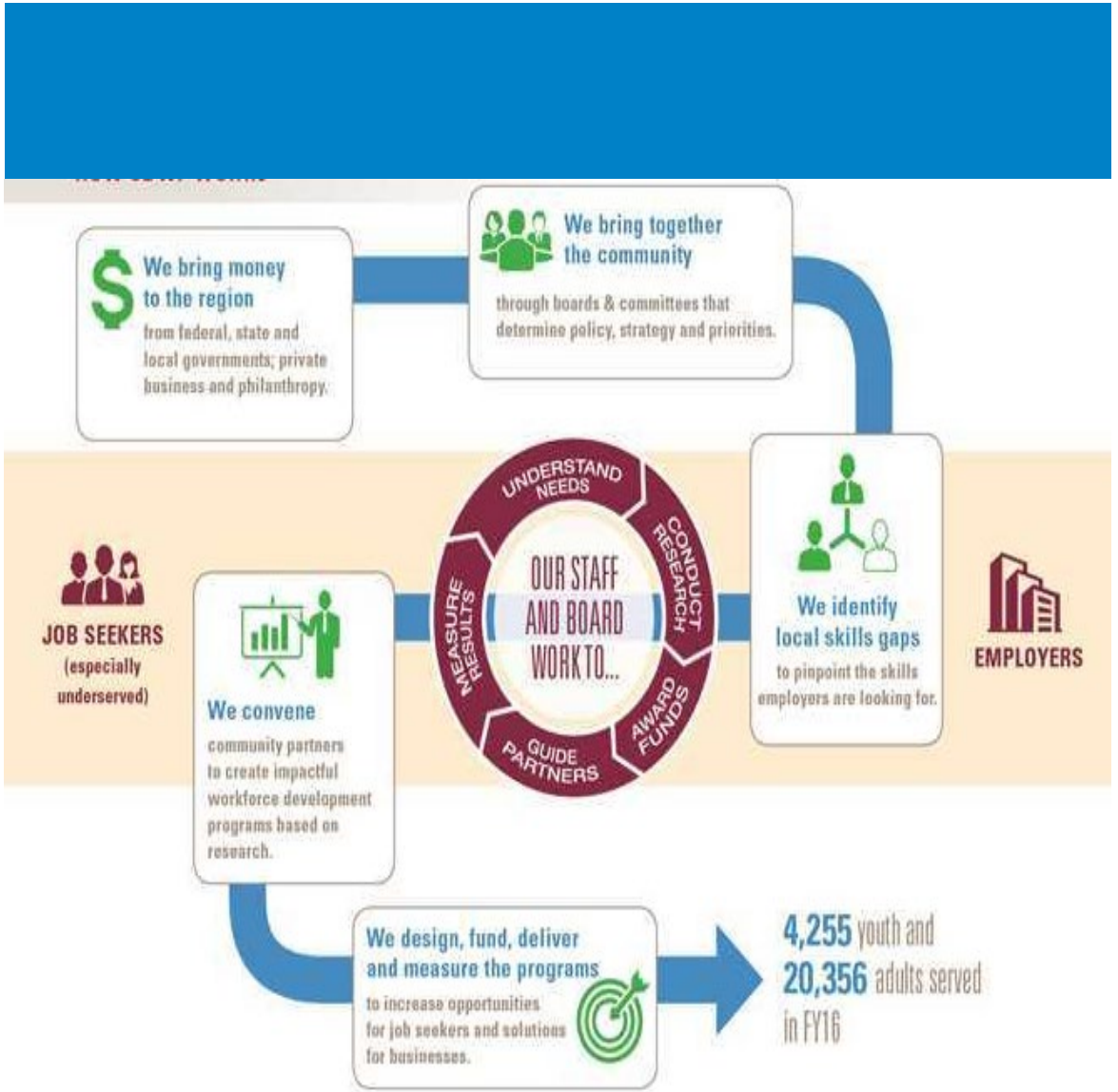


cwa california workforce association

WHAT IS THE WORKFORCE SYSTEM

cwa california workforce association


Strategic Partners
Industry Members
America's JobCenter of California℠
Convener
Strategic Partners create a Career Pathway System based on industry needs
Input from industry
Partnership synergies reverberate back
Career Pathway System
Industry Cluster
ENTER WORKFORCE
RETRAINING
Workforce training (certificate)
University (degree)
Community college (degree or certificate)
Organized labor training/ apprenticeships (certificate)
High school (diploma or equivalent)
Adult Basic Education (credential)
Small Businesses
Start ups
Medium Firms
Large/Anchor Firms
Support Sectors
Suppliers
MARKETS AND BUYERS
SUPPLY CHAINS
INFRASTRUCTURE
INNOVATION AND TECHNOLOGY
LABOR


We bring money to the region
from federal, state and local governments; private business and philanthropy.
We bring together the community
through boards & committees that determine policy, strategy and priorities.
JOB SEEKERS (especially underserved)
We convene
community partners to create impactful workforce development programs based on research.
UNDERSTAND NEEDS
CONDUCT RESEARCH
AWARD FUNDS
GUIDE PARTNERS
MEASURE RESULTS
OUR STAFF AND BOARD WORK TO...
We identify local skills gaps
to pinpoint the skills employers are looking for.
EMPLOYERS
We design, fund, deliver and measure the programs
to increase opportunities for job seekers and solutions for businesses.
4,255 youth and 20,356 adults served in FY16

WHAT IS THE WORKFORCE SYSTEM

cwa california workforce association

The Present of Workforce Development WIOA

Opportunity to improve job and career options for our nation's workers and jobseekers through an integrated, job-driven public workforce system that links diverse talent to businesses.

Supports the development of strong, vibrant regional economies where businesses thrive and people want to live and work.

cwa california workforce association

3 Critical Hallmarks of WIOA Excellence

- The needs of business and workers drive workforce solutions;
- One-Stop Centers (or American Job Centers) provide excellent customer service to jobseekers and employers and focus on continuous improvement; and
- The workforce system supports strong regional economies and plays an active role in community and workforce development.

cwa california workforce association

Business Drives Workforce Solutions

- Businesses inform and guide the system
- Shape regional investments and build a pipeline of skilled workers.
- Engagement includes leadership and participation in the development of
  - Education and Training, Curricula Development
  - Apprenticeship and Work-based learning,
  - Career Pathways,
  - Industry Sector Partnerships.

cwa california workforce association

Support Strong Regional Economies

- Aligns education and training investments
- Promotes local alignment with labor markets and economic development activities.
- Supports regional strategic planning

cwa california workforce association

Workforce Boards Focus on Strategy

- In partnership with governors and chief elected officials, facilitate public-private partnerships
- Support sector strategies and career pathways that advance opportunities for all workers
- Work on the socioeconomic issues and future of work
- Foster innovation; and ensure streamlined operations and service delivery excellence

cwa california workforce association

Workforce Boards Focus on Strategy

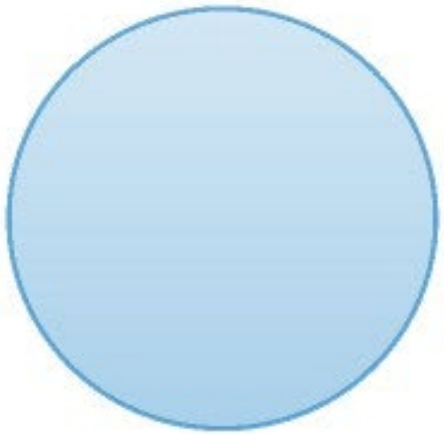
13 Functions Of A Workforce Board

- Local and Regional Planning
- Research and Labor Market Analysis
- Convening, Brokering, Leveraging
- Business Engagement
- Career Pathway Development
- Proven and promising practices
- Use of Technology
- Program Oversight
- Negotiations of Performance
- Selection of Providers/Operators
- Coordination with Education Partners
- Budget and Administration
- Accessibility: Program and Physical

cwa california workforce association

What then….is the Real role of workforce development boards??

cwa california workforce association

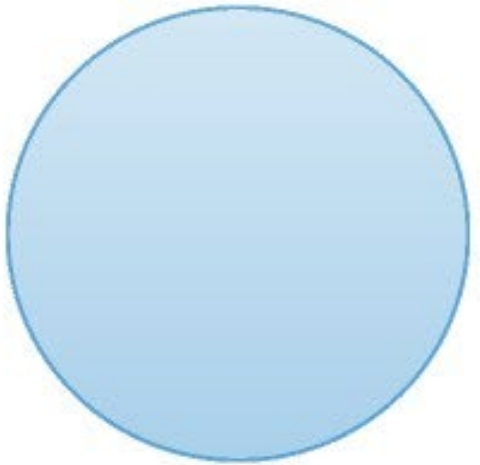


Jobseekers and Workers

with the

- skills
- knowledge
- resources

to find and retain quality employment

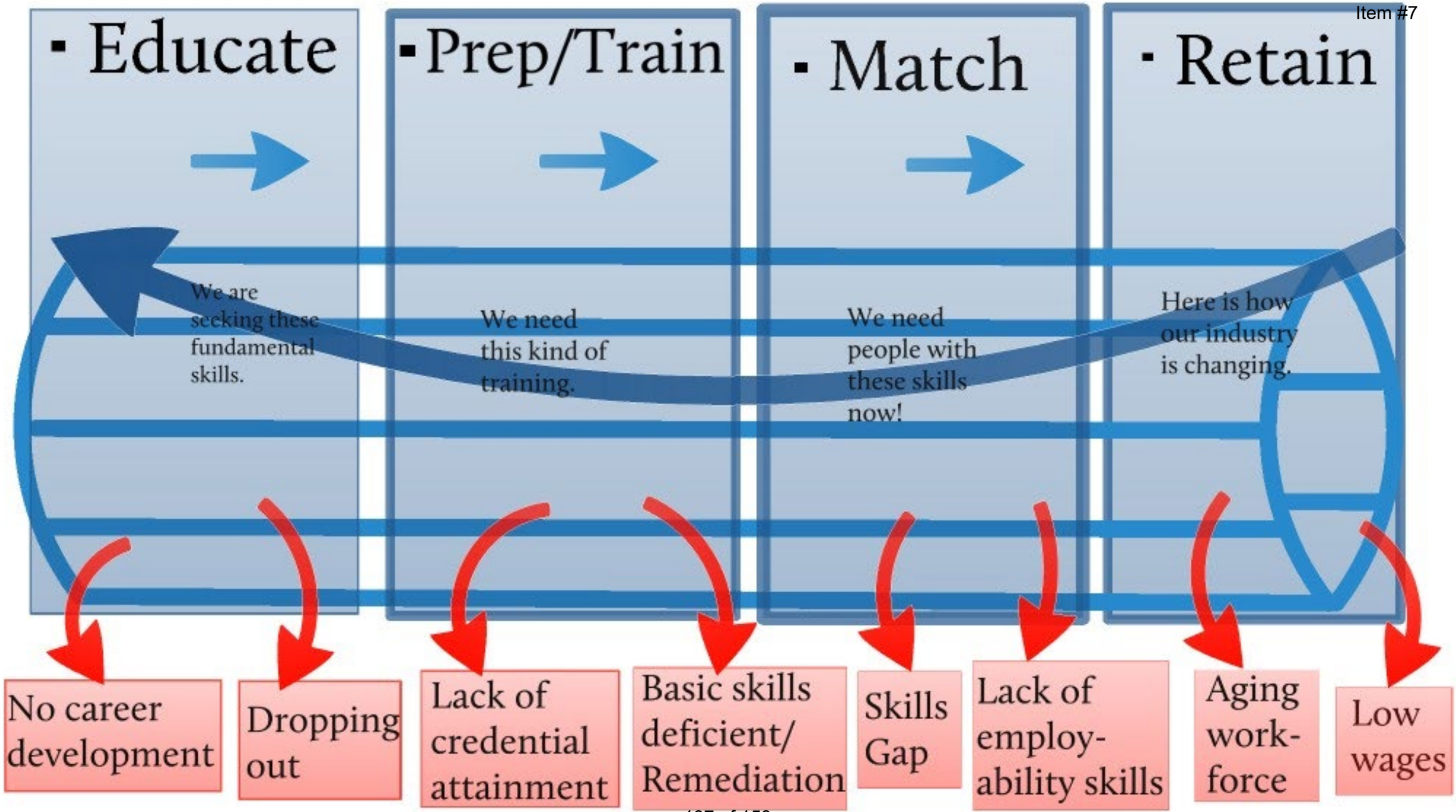


Businesses and Employers

with the

- talent
- pipeline
- proactive/reliable workforce system

to sustainably and competitively grow


· Educate
· Prep/Train
· Match
· Retain
We are seeking these fundamental skills.
We need this kind of training.
We need people with these skills now!
Here is how our industry is changing.
No career development
Dropping out
Lack of credential attainment
Basic skills deficient/ Remediation
Skills Gap
Lack of employ-ability skills
Aging work-force
Low wages

How do we do this? Magic?

cwa california workforce association

Workforce Boards Focus on Strategy

Who is on your workforce board? Sec 107(b)(2) of WIOA

- Selected by Chief Local Elected Official
- Majority must represent biz in local area (2 members must rep small biz)
  - Be owner, exec., hiring authority
  - In-demand sectors or occupations
- Local Boards must include representatives of:
  - Labor organizations - 2 or more (CA this is 20%)
  - Registered Apprenticeships - 1 or more
  - Adult Ed and Literacy
  - Higher Education
  - Economic Development
  - EDD/Wagner-Peyser
  - Vocational Rehabilitation

cwa california workforce association

OC Economic Opportunities

4,000 job growth in Dec. 2022
- Trade, Transportation and Utilities
- Leisure and Hospitality
- Manufacturing and Education

70,300 Year over Year
- Leisure and Hospitality
- Education and Health Services
- Professional and Biz Services

County UI Rate stood at 2.5% in Dec 2022

Over $600 million received in ARPA Funding.
March 2021-December 2024
Spent by 2026

Universities and Comm Colleges
UC Irvine, CSU Fullerton, Chapman plus 9 community colleges

CEO Leadership Alliance committed to growing talent pipelines in OC
- Career Exploration Experiences
- OC Fellows
- SoCal Master Fund
- Ecosystems Events

Key Industry Drivers:
Adv. Transportation Adv. Manufacturing
Health Care & Biotech
Energy, Utilities and Const.
IT and Digital Media
Hospitality and Tourism

OC Graduation Rate is 91.4%

56% of Pop have adv. degree

cwa california workforce association

OC Socio-Economic Challenges

Only 29% of first-time home buyers can afford to by an entry-level home in OC. That is down from 41% in 2020

Median Home Price $1,265,000
CA Median $863,790

Population is getting older. The only age group that has a growth trend is 65+. With 25 to 64 year-olds dropping by 23%

28.5 % of part-time workers lived below poverty level

Fastest growing industry in 2022: Hospitality and Leisure
Average wage $36,436 annually

Est 10% or 319,386 people live at or below poverty level

Layoffs since July 2022
Tech, Finance, Medical Mfg, Mortgage

BIPOC are the majority in the county, but face disproportionate levels of poverty, and educational attainment challenges, and barriers to equitable civic engagement.
African American UI – 8%
Latino – 5%

cwa california workforce association

Workforce Stakeholders need to work together to stabilize build the economy – ARPA, Infrastructure Act, CHIPS++ Act, CERF, HRTP

Take measure of your local economy now – look at those "lifeboat" jobs and explore permanent shifts. Learn about Skill Adjacency

How will you manage the need to show impact now? Think Indicators of Success and measure

(beyond WIOA?)

How do we support business stabilization and economic growth (small business)?

Where does our community need to be "shored" up in terms of access – both virtual and programmatic? How does access work

How do we use these to intentionally break cycles of inequities and racism in the labor markets?

Return to Work and Job Creation Strategies – Apprenticeship, Work Experience, Entrepreneurship, Incubaters, etc.

Input that you can AND should take into account..

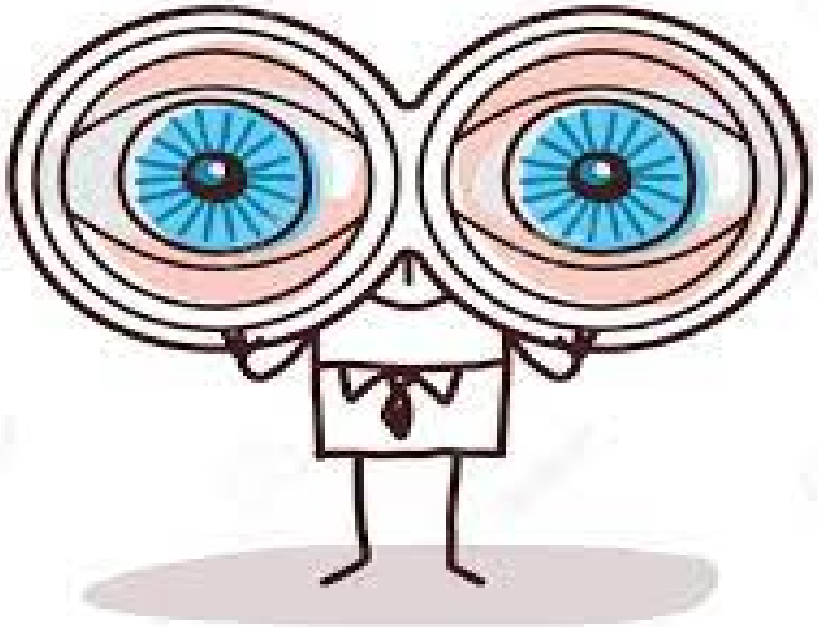
cwa california workforce association

Moving Forward

Concepts	Strategic Planning	Action Planning
Time Period	3-5 years	Next year or two (12-24 mos.)
Modification	Not often – Annually	Regularly - Monthly
Goals	Outline Vision-Broad in Scope	Applies to specific deliverable-how do we get them done
Plan Generation	High-Level Leadership	Committees, staff, etc.
Reporting	Annually or Qtly – High Level	Monthly, this keeps on organization on track

cwa california workforce association

How does this look when it comes together?



cwa california workforce association

CARES Act PPE and PPP Loans

High Road Kitchen

Aero-Flex Sector

Y4 Youth Event

High Road Construction Careers

Grow Manufacturing Initiative

cwa
california workforce association

WHAT IS THE INNOVATION FUND? It was established in September 2017 to spur the development of innovative projects that train and prepare underrepresented populations for employment in high-growth sectors.

HOW MUCH FUNDING?
$1 million annually

MAXIMUM LEVEL OF FUNDING PER PROPOSAL
$200K per proposal

WHO MAY SUBMIT A PROPOSAL? All County operated AJCCs

WHERE? LA County Workforce Development Area

WHO IS ELIGIBLE TO PARTICIPATE IN THE PROGRAM? Any individual who is eligible to WIOA Tilte I Adult program specifically priority is given to underrepresented population such as Foster, CalWORKs. GROW, Probation, and Homeless who are enrolled with one of our County operated AJCCs. Basic eligibility to WIOA Adult Program:
Age 18 years of age or older • U.S. Work Authorization • Selective Service Registrant (if applicable)

CONSTRUCTION

SELECTED MANUFACTURING

TRADES & LOGISTICS

ENTERTAINMENT & INFO TECH

HEALTH CARE

LEISURE & HOSPITALITY

HIGH GROWTH SECTORS

Recycling Lives

Was formed with Kern Alliance of Business, the not-for-profit entity of Employers' Training Resource with the intent to break the cycle of homelessness, poverty and incarceration by recycling lives and glass in Kern County. Recycling Lives installed a Glass Pulverize System to turn volumes of waste glass into fine sand and glass cutlets to be sold in bulk to private businesses, local cities and to the County of Kern to be used in public work projects.

Through a unique partnership between Bakersfield Adult School, BARC, County of Kern and Kern Alliance of Business, Recycling Lives offers a classroom training program that provides adult learners with the principles of the recycling process, including entrepreneurship and business fundamentals. The Recycling Lives program includes classroom training on basic safety and equipment operation (which includes certification on Skidsteers and different types of forklifts), soft skills, basic work readiness, basic accounting, warehousing, sales and marketing. The participants will also learn goal setting, resource allocation, organized structure and management techniques.

Transitional Jobs Programs

Experts in the Room

- What are economic opportunities or challenges that you are interested in working on in your capacity as an OC Workforce Board Member?
- Brainstorm to individually, two economic opportunities and socio-economic challenges
- Share out.

cwa california workforce association

Questions? & Adjournment

cwa california workforce association

- OCWEDD COMPLIANCE/MONITORING UPDATES -

ONGOING EMPLOYMENT DEVELOPMENT DEPARTMENT (EDD) AUDITS	
INFORMATION	**STATUS** (As of April 2023)
WIOA Fiscal and Procurement Review Program Years 2016-17 & 2017-18 (Special Audit)	ONGOING
WIOA National Dislocated Worker Grant (NDWG) 2017- California Wildfires (10/18/17 -12/10/18)	ONGOING
EDD Technical Support (Case #2017-SA-003)	ONGOING
WIOA Section 188 Desk Review Program Year 2022-23	ONGOING
EDD Orange RPI 4.0 Monitoring PY 2022-23	ONGOING
RESOLVED / COMPLETED EMPLOYMENT DEVELOPMENT DEPARTMENT (EDD) AUDITS	
INFORMATION	**STATUS** (As of April 2023)
WIOA Youth Program Monitoring PY 2019-20 (Review period September 1, 2017, through August 31, 2019)	RESOLVED/COMPLETED
85% Formula Grant Review Program Year 2020-21 (Review period September 1, 2018, through December 31, 2020)	RESOLVED/COMPLETED
2020 COVID-19 Employment Recovery NDWG Monitoring Review for Program Year 2021-22	RESOLVED/COMPLETED
WIOA Formula Grants Review Program Year 2018-19	RESOLVED/COMPLETED
WIOA Fiscal and Procurement Review Program Year 2018-19	RESOLVED/COMPLETED
Fiscal and Procurement Monitoring Review 85% Formula Grant Program Year 2019-20	RESOLVED/COMPLETED
Enhanced Desk Review Monitoring- Regional Organizer/Regional Training Coordinators	RESOLVED/COMPLETED
2020 COVID-19 Employment Recovery NDWG Monitoring Review Program Year 2021-22	RESOLVED/COMPLETED
WIOA Section 188 Desk Review Program Year 2021-22	RESOLVED/COMPLETED
EDD Single Audit Report (case number 2018-SA-005) for the Fiscal Year ending June 30, 2019	RESOLVED/COMPLETED
Fiscal and Procurement Monitoring Review PY 2019-20 (Period of January 1, 2019, through December 31, 2019)	RESOLVED/COMPLETED
WIOA Youth Program Monitoring Program Year 2019-20	RESOLVED/COMPLETED
85% Formula Grant Review Program Year 2021-22 (Review period July 1, 2021, through June 30, 2022)	RESOLVED/COMPLETED
COUNTY OF ORANGE FISCAL MONITORING & COMPLIANCE AUDITS	
INFORMATION	**STATUS** (As of April 2023)
OCCS/CM&PC Fiscal Monitoring Reviews Program Year 2019-20	RESOLVED/COMPLETED
OCCS/CM&PC Fiscal Monitoring Reviews Program Year 2020-21	RESOLVED/COMPLETED
OCCS/CM&PC Fiscal Monitoring Reviews Program Year 2021-22	ONGOING

- OCWEDD COMPLIANCE/MONITORING UPDATES -

OC COMMUNITY SERVICES (OCCS)/CONTRACTS MONITORING & PROGRAM COMPLIANCE (CM&PC) PROGRAM MONITORING & COMPLIANCE AUDITS	
INFORMATION	**STATUS** (As of April 2023)
OCCS/CM&PC Program Monitoring Reviews Program Year 2019-20	RESOLVED/COMPLETED
OCCS/CM&PC Program Monitoring Reviews Program Years 2020-21 and 2021-22	ONGOING