

## **WB MEMBERS**

AMY SCHULZ  
Sierra College

CHRISTINA NICHOLSON  
Whole Person Learning

DANIELA DEVITT  
California Employers Association

DAVID LUKE  
Department of Rehabilitation

ERIC COOPER  
California Indian Manpower Consortium

ERIC ULRICH  
Hacker Lab

JAMES DION  
Employment Development Department

JASON BUCKINGHAM  
Golden Sierra Job Training Agency

JOHN TWEEDT  
District Council 16

KEVIN FERREIRA  
Sacramento Sierra Building &  
Construction Trade Council

LAUREL BRENT-BUMB  
El Dorado Chamber of Commerce

LISA HUTCHINSON  
Revere Packaging

MICHAEL ZIMMERMAN, *Vice Chair*  
MTI College

PAUL CASTRO  
California Human Development

RICK LARKEY, *Chair*  
North State Building Industry Foundation

ROBIN TRIMBLE  
Rocklin Area Chamber of Commerce

SHERRI CONWAY  
Placer County Office of Economic  
Development

STEVEN CASPERITE  
Placer School for Adults

TINK MILLER  
Placer Independent Resource Services

VIC WURSTEN  
PRIDE Industries

VOLMA VOLCY  
Sacramento Central Labor Council  
AFL-CIO

WILLIAM REED  
United Domestic Workers of America

## **GOLDEN SIERRA WORKFORCE BOARD EXECUTIVE COMMITTEE REGULAR MEETING AGENDA**

**Thursday, September 17, 2020 @ 12:00 PM**

In response to the Governor's Executive Order N-29-20 relating to the COVID-19 Pandemic, the Golden Sierra Job Training Agency Executive Committee is conducting this meeting on Zoom.

Members of the public are encouraged to participate in the meeting by submitting written comments by email to [magnussen@goldensierra.com](mailto:magnussen@goldensierra.com). Public comments will be accepted until the adjournment of the meeting, distributed to the Executive Committee and included in the record.

### **Public Location:**

<https://us02web.zoom.us/j/87260408432?pwd=V20vU011S2psVUhtTS1A3ZzE2WktKdz09>

Passcode: 932324

Members of the public may join the meeting by clicking the link above or typing the meeting address above into their web browser, or listen to the meeting on

Or iPhone one-tap : US: +16699009128,,87260408432#,,,,,0#,,932324# or  
+12532158782,,87260408432#,,,,,0#,,932324#

Or Telephone: Dial (for higher quality, dial a number based on your current location):  
US: +1 669 900 9128 or +1 253 215 8782 or +1 346 248 7799 or +1 312 626 6799 or  
+1 646 558 8656 or +1 301 715 8592

Webinar ID: 872 6040 8432

Passcode: 932324

International numbers available: <https://us02web.zoom.us/j/87260408432?pwd=V20vU011S2psVUhtTS1A3ZzE2WktKdz09>

*Mission: The Golden Sierra Workforce Board convenes industry leaders and key partners to identify workforce initiatives, create innovative solutions and measure the success of systems' ability to meet industry and workforce needs.*

### **I. ROLL CALL AND INTRODUCTION OF GUESTS**

### **II. APPROVAL OF AGENDA**

1-2

### **III. CONSENT AGENDA**

All matters listed under the Consent Agenda are considered to be routine in nature and will be approved by one blanket motion.

- a) Approval of Minutes from July 16, 2020 EC Meeting
- b) Attendance Log

3-5  
6

### **IV. PUBLIC COMMENT – FOR ITEMS NOT ON THE AGENDA**

### **V. FY 2020-2021 AGENCY BUDGET – FINAL**

7-14

### **VI. WORKFORCE BOARD MEMBERSHIP & RECRUITMENT**

15-33

### **VII. BOARD INITIATIVES**

#### **EQUAL OPPORTUNITY**

Golden Sierra is an equal opportunity employer/program. Auxiliary aids and services are available upon request. Special requests for services, aids and/or special formats need to be made by calling (916)-773-8540 (Voice). TTY users please call the California Relay Service at 711.

VIII. REGIONAL UPDATES

IX. ONE-STOP OPERATOR REPORT OUT & DIRECTION

34

X. FUTURE AGENDA ITEMS/NEW BUSINESS

XI. NEXT MEETING

Thursday, November 19, 2020 @ 12:00 pm

XII. ADJOURNMENT

**GOLDEN SIERRA WORKFORCE BOARD  
EXECUTIVE COMMITTEE  
REGULAR MEETING  
MINUTES**

**Thursday, July 16, 2020 @ 12:00 PM**

In response to the Governor's Executive Order N-29-20 relating to the  
COVID-19 Pandemic, the Golden Sierra Job Training Agency  
Executive Committee is conducting this meeting on Zoom.

**Public Location:**

<https://us02web.zoom.us/j/88023268409?pwd=Q0tgQlFHWlI5aldhZ1V6Y045M0U3QT09>

Password: 372300

**I. ROLL CALL AND INTRODUCTION OF GUESTS**

Quorum was established and meeting called to order at 12:01 pm by Chair  
Larkey

☒ Rick Larkey (Chair)  
☒ Greg Geisler  
☒ Laurel Brent-Bumb  
☒ John Tweedt

☒ Michael Zimmerman (Vice-Chair)  
☒ Jason Buckingham  
☒ Robin Trimble

**GSJTA Staff:**

☒ Lorna Magnussen  
☒ Lisa Nelson

**One-Stop Operator:**

☒ Michael Indiveri

**II. APPROVAL OF AGENDA**

**Motion** to approve agenda by Zimmerman, second by Trimble

**Motion** approved unanimously

**III. CONSENT AGENDA**

All matters listed under the Consent Agenda are considered to  
be routine in nature and will be approved by one blanket motion.

- a.) Approval of Minutes from May 21, 2020 EC Meeting
- b.) Attendance Log

**Motion** to approve consent agenda items a-b by Trimble, second by Zimmerman

**Motion** approved unanimously

**IV. PUBLIC COMMENT – FOR ITEMS NOT ON THE AGENDA**

NONE

V. WORKFORCE BOARD MEMBERSHIP & RECRUITMENT

**Motion** to recommend James's Dion application be forwarded to the Governing Body and approve renewal of Jason Buckingham and Daniella Devitt terms to June 30, 2024 by Brent-Bumb, second by Trimble

**Motion** approved unanimously

VI. BOARD INITIATIVES

a.) DIGITAL LITERACY: Open discussion on importance of online programs that help individuals at entry level positions

b.) SOCIAL EQUITY: Open discussion asking if the board is interesting in investing more time looking into this type of program in our 3 regions. Similar to Project Labor Agreements (PLA) targeting zip codes, currently in the Sacramento area, helping residents gain employment in construction opportunities.

VII. REGIONAL UPDATES

Campaign "Better Together" for past 2-3 years has created a website/portal that employers can access, providing contacts to appropriate workforce boards in their area.

SB1 Funding: Gas Tax provides money for training and infrastructure projects serving Yolo/Sacramento/Golden Sierra. Awarded \$1.5 million to provide MC3 training to serve 200 individuals (50 out of Golden Sierra region)

VIII. ONE-STOP OPERATOR REPORT OUT & DIRECTION

Indiveri reported as outlined in Agenda Packet – Teleconference Meeting occurred June 17, 2020

\* Michael Indiveri recused himself @ 12:49pm

IX. ONE-STOP OPERATOR RFQ RESULTS AND RECOMMENDATIONS

Buckingham reported out as outlined in Agenda Packet

**Motion** to make recommendation to Workforce Board to award Michael Indiveri a 1 year contract with intent to extend up to 3 additional years annually based upon performance as outlined in deliverables, by Trimble, second Zimmerman

**Motion** approved unanimously

X. FUTURE AGENDA ITEMS/NEW BUSINESS

- Board Membership
- Final Budget
- Board Initiatives

XI. NEXT MEETING

Thursday, September 17, 2020 @ 12:00 pm

XII. ADJOURNMENT

**Motion** to adjourn meeting at 1:00 pm by Brent-Bumb, second by Zimmerman

**Motion** approved unanimously

<b>Date:</b>	<b>9/30/19</b>	<b>10/17/19</b>	<b>1/16/20</b>	<b>3/10/20</b>	<b>3/19/20</b>	<b>5/21/20</b>	<b>7/16/20</b>	<b>Rate</b>
<b>Executive Committee</b>	<b>EC</b>	<b>EC</b>	<b>EC</b>	<b>EC</b>	<b>EC</b>	<b>EC</b>	<b>EC</b>	
<b>Meeting Type</b>	<b>Special</b>	<b>Regular</b>	<b>Special</b>	<b>Special</b>	<b>Special</b>	<b>Regular</b>	<b>Regular</b>	
Rick Larkey- <b>CHAIR</b>	1	1	1	1	1	1	1	100%
Michael Zimmerman- <b>VICE CHAIR</b>	1	1	0	1	1	1	1	86%
Laurel Brent-Bumb	1	1	1	1	1	1	1	100%
Jason Buckingham	1	1	1	0	1	1	1	86%
Gregg Geisler	0	1	0	1	1	1	1	71%
Robin Trimble	0	1	1	1	1	1	1	86%
John Tweedt						0	1	50%

**GOLDEN SIERRA  
WORKFORCE BOARD  
EXECUTIVE COMMITTEE**

**MEMORANDUM**

**DATE:** September 17, 2020

**TO:** Executive Committee (EC)

**FROM:** Jason Buckingham, GSJTA Executive Director

**SUBJ:** FY 2020-2021 Agency Final Budget

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Before the Board for review is the Agency Fiscal Year 2020-2021 Final Budget. The budget is a part of Workforce Board responsibilities as per WIOA. The Act requires the Board to develop a program budget in partnership with the Governing Body. The Action requested is to make a recommendation to the Governing Body to approve the final budget for 2020-2021. The budget has been developed with a focus on the WIOA Local Workforce System requirements. See the budget narrative for additional details.

### ***Budget Introduction and Overview***

Golden Sierra Job Training Agency is a Joint Powers Authority (JPA) organized between the counties of Placer, El Dorado and Alpine. The Agency's annual source of funds is the Title 1 award from the *Workforce Innovation and Opportunity Act (WIOA)*. Additionally, the Agency administers miscellaneous grants and awards that complement the WIOA Title 1 objectives and the stated purpose of the JPA.

### ***Approach in Developing the Final Budget for Fiscal Year 2020/2021***

The model used to develop the Consortium's annual budget is the Priority Based Budget model. The goal is to develop a budget based on the relationship between program funding levels and expected results from that program. The objectives are to retain cost-efficient and effective ways to meet the requirements of the *Workforce Innovation and Opportunity Act (WIOA)* while providing quality services to participants and meeting the debt obligations of the Agency.

#### ***The Fiscal Year 2020/2021 Final Budget:***

The funding used to develop the budget represents rollover funding from the *Workforce Innovation and Opportunity Act (WIOA)* Title 1 formula fund allocations, Subgrant AA011006 and the new allocation communicated to the Consortium by the Employment Development Department (EDD) via the Workforce Services Information Notice (WSIN) WSIN19-45. Other programs to be administered by the Agency are categorized as Non-Allocation grants. These grants have been awarded via competitive processes. The largest of which include the Prison to Employment Initiative and the SB1 High Road Training Project being awarded by the California Workforce Development Board. This funding is being administered by Golden Sierra on behalf of the Capital Region Workforce Boards including SETA, NCCC, and Yolo County. Additional non-allocation funding includes funding related to pandemic emergency response, and services to individuals with disabilities.

#### ***The budget meets mandated funding requirements as follows:***

20% of the Adult and Dislocated Worker funding will support *Direct Training* with a planned assumption of 10% leverage in order to meet the full requirement of 30% with a 20/10 ratio of WIOA cash/leverage.

20% of the Youth funding is earmarked to meet the *Youth Work Based Learning (WBL)* requirement as outlined in the WIOA Title I award. To clarify, *Work Based Learning* only includes a participant's enrollment in employment related training such as an On-The-Job Training (OJT) or Work Experience (WEX). It does not include classroom training. Seventy percent of the earmarked WBL funding is planned to support career services for eligible WBL participants in the program.

The remaining cost objectives required of the Title I funding is to maintain a minimum of one *Comprehensive - America's Job Center (AJC)* in the *Local Area* while strategically utilizing financial resources to meet the debt service required payments for the liabilities of the Joint Powers Authority (JPA) while participating in the continued development of both local and regional *Workforce Systems*.

Approved By:  
Executive Committee:  
Workforce Board:  
Governing Body



### **Allocation Funding Changes**

- WSIN19-45 plans for a slight increase in Adult, Dislocated Worker and Youth funding for 2020/2021 over fiscal year 2019/2020. The increase is just under 2%
- Due to COVID-19, Rapid Response was extended, and the Funds Utilization Requirements have been lifted allowing a greater carryover than would normally be allowed
- Rapid Response and Layoff Aversion allocations have been updated to reflect actual awards for 2020/2021 with a slight decrease over 2019/2020
- The Agency has been able to reduce costs in staffing as well as services and supplies from PY19/20
- There is a slight increase in funding for Advance bringing their total award for PY20/21 to \$100,000 (an approx. \$25,000 increase from Draft)
- There is a new line item for the Workforce Board which allows the board to implement \$50,000 worth of initiatives as it sees fit. This is a \$20,000 increase from Draft.
- Included in the budget is a transfer of 80% of the Dislocated Worker funding to the Adult funding stream. This is flexibility allowed in the law that increases access to funds for participants and eases eligibility documentation for the community.
- Services and Supplies, and Professional Services increase slightly from Draft in order to accommodate virtual service models due to the pandemic, WIOA plan development, and contracting as a part of regional grant administration.

### ***Additional Notes***

There are several changes to the historical presentation. Perhaps most notable is that all salaries have been separated out from client services. This has been done for the sake of transparency as it allows for a clear review of direct client expenditures. However, it does skew the comparison from FY 19/20 to FY20/21. It does not skew the presentation of Draft to Final.

The Budget presentation has been reduced to two schedules; schedules 1, and 2. This is largely due to Placer County's transition to a new countywide system. We anticipate greater changes to schedule 2 (Cost Center Detail) to be presented at a later date.

The agency procured the Workforce Board's One-Stop Operator as required by law and has included costs for that service in Professional Services.

The impact of COVID-19, the lifting of funds utilization, and the roll as regional grant administrator has presented us with a unique opportunity in that it provided us with enough funding to increase funding for activities such as the Board Initiatives, career and training services, and funding the Advance contract at \$100,000.

Approved By:  
Executive Committee:  
Workforce Board:  
Governing Body

**Description of Schedules**

**Schedule 1      Consortium Draft to Final Budget**

Schedule is based on estimated rollover funding, non-allocation carry over, and new awards. Expenditures have been adjusted based on anticipated cost increases, WIOA spending requirements, and pension debt service requirements and shows a comparison of FY20/21 draft Budget to the proposed Final Budget for FY2020/2021

**Schedule 2      Consortium Cost Center Detail**

- Consortium Administration: Includes fiscal management, procurement, and human resource functions.
- Consortium Program Operations: Includes program oversight and technical assistance to member counties. Staff and consultants have expertise in ADA/EO compliance, program monitoring, WIOA continual refinement, and database management.
- Consortium Rapid Response and Layoff Aversion: Includes activities related to business outreach, workshop facilitation, and labor exchange. Staff have expertise in helping affected employees return to work as quickly as possible following a layoff and developing early-warning systems to prevent layoffs altogether.
- Consortium Comprehensive One-Stop: Includes the physical location and related operating expenses of the required job center that offers universal access and comprehensive employment-related programs and services.
- El Dorado County Career and Training Services: Includes PY 19/20 carry-in funds and PY20/21 WIOA funding to be administered by the Agency.
- Placer County Career and Training Services: Includes PY 19/20 carry-in funds and PY 20/21 WIOA funds to be administered by the Agency staff.
- South Lake Tahoe / Alpine County Career and Training Services: Includes balance of contract for PY 19/20 carry-in funds. Services awarded to Advance. Planned PY 20/21 WIOA funding scheduled to be awarded to Advance

Cost Centers listed here are non-routine in nature managed by the Agency:

The Disability Employment Accelerator– purpose is for the Agency to provide Work based learning opportunities for college students with disabilities

Trade and Economic Transition (TET) National Dislocated Worker Grant (NDWG)

The Prison to Employment Grant – Implementation Supportive Services

The Prison to Employment Grant – Implementation Direct Services

Approved By:  
Executive Committee:  
Workforce Board:  
Governing Body

SB1 – High Road Training Project

COVID-19 25% Additional Assistance provides financial support services for those suffering wage loss due to the Pandemic

COVID-19 National Dislocated Worker Grant (NDWG) Provides rapid reemployment services, training and SS for those who suffered job loss due to the Pandemic

Board Initiatives: Includes discretionary funding for Workforce Board Initiatives which must be spent by June 30, 2022

Surplus Funds Surplus funds, if available, represent discretionary funding for allocation by the Governing Body

Approved By:  
Executive Committee:  
Workforce Board:  
Governing Body

Presented: September 2021									
L i n e  #		A		B		C		B/A	
		Consortium Fiscal Year 2020/2021 Draft Budget	% of Total Funding	Consortium Fiscal Year 2020/2021 Final Budget	% of Total Funding	Column A less Column B Change Between Fiscal Year 20/21 Draft Budget to 20/21Final Budget	Percent Change from Fiscal Year 20/21 Draft Budget to FY 20/21 Final Budget		
Funding Sources:									
1	Carry-In WIOA Allocation	\$ 1,320,571		\$ 1,282,495		\$ (38,076)	-2.88%	SOURCES	
2	Awarded WIOA Allocations	\$ 2,523,548		\$ 2,523,548		\$ -	0.00%		
3	Carry-In RR/LA	\$ 28,279		\$ 56,696		\$ 28,417	100.49%		
4	Awarded Rapid Response Funds	\$ 256,712		\$ 239,112		\$ (17,600)	-6.86%		
5	Awarded Layoff Aversion Funds	\$ 64,813		\$ 56,758		\$ (8,055)	-12.43%		
6	Non Allocation Awards Carried In	\$ 1,134,861		\$ 1,126,987		\$ (7,874)	-0.69%		
7	Non-Allocation Awards (New)	\$ 350,000		\$ 1,869,000		\$ 1,519,000	434.00%		
8	Total Funding Sources PY 20	\$ 5,678,784		\$ 7,154,596		\$ 1,475,812	25.99%		
Expenditures:									
9	Retiree Benefits	\$ 751,903	13.57%	\$ 751,903	10.73%	\$ -	0.00%	EXPENDITURES	
10	Salaries and Benefits	\$ 1,305,209	23.55%	\$ 1,306,679	18.65%	\$ 1,470	0.11%		
11	Services and Supplies	\$ 274,724	4.96%	\$ 321,415	4.59%	\$ 46,691	17.00%		
12	Professional Services	\$ 140,480	2.53%	\$ 209,846	3.00%	\$ 69,366	49.38%		
	Encumbrances	\$ 191,206		\$ -		\$ 191,206	#DIV/0!		
13	Salaries, Services, and Encumbrances Total	\$ 2,663,522	48.05%	\$ 2,589,843	36.97%	\$ (73,679)	-2.77%		
Career & Training Services									
14	Placer County	\$ 533,994	9.63%	\$ 492,718	7.03%	\$ (41,276)	-7.73%	DIRECT CLIENT EXPENDITURES	
15	El Dorado County	286,995	5.18%	316,232	4.51%	29,237	10.19%		
16	So Tahoe & Alpine County	148,444	2.68%	173,445	2.48%	25,001	16.84%		
17	Non Allocation Carried in From Prev FY	928,480	16.75%	160,687	2.29%	(767,793)	-82.69%		
18	Non-Allocation Awards (New)	74,250	1.34%	170,554	2.43%	96,304	129.70%		
	Regional Contracts			1,699,604	24.26%				
19	Career & Training Services Total	\$ 1,972,163	35.58%	\$ 3,013,240	43.02%	\$ 1,041,077	52.79%		
20	Board Initiatives	\$ 30,000	0.54%	\$ 50,000	0.71%	\$ 20,000	40.00%	WORKFORCE BOARD EXPENDITURES	
	Non allocation Carry-out to New FY	172,796		434,625		\$ 261,829	151.52%	CARRYOUT	
21	Allocation carry-out to New FY	\$ 704,477	12.71%	\$ 916,888	13.09%	\$ 212,411	30.15%		
	Carry-out to PY 21 Total	\$ 877,273		\$ 1,351,513		\$ 474,240	54.06%		
22	TOTAL EXPENDITURES	\$ 5,542,958		\$ 7,004,596		\$ 1,461,638	26.37%		
23	Net Surplus vs (Deficit)	\$ 135,826		\$ 150,000		\$ 14,174	10.44%	Surplus vs (Deficit) Surplus for GB distribution Recommend additional pension liability reduction payment	

		<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>	<u>E</u>	<u>F</u>	<u>G</u>
		Consortium Admin (WIOA)	Consortium Program Operations (WIOA)	Consortium Rapid Response and Layoff Aversion	Local Area One-Stop Delivery System	El Dorado County Career and Training Services	Placer County Career and Training Services	Alpine County & South Lake Tahoe Career and Training Services
#								
	<b>Funding Sources:</b>							
1	Carry-In Allocation Funds from PY 20	\$ 241,616	\$ 372,179		\$ 58,608	\$ 168,640	\$ 368,008	\$ 73,445
2	Allocation Awards PY 21	252,356	958,948	-	302,825	341,835	567,583	100,000
3	Carry-In Rapid Response/LA	-	-	56,696	-	-	-	-
4	Awarded Rapid Response Funds PY 21	-	90,863	119,556	28,693	-	-	-
6	Awarded Layoff Aversion Funds PY 21	-	21,568	28,379	6,811	-	-	-
	Carry-In Non-Allocation from PY 20							
7	Actual Non-Allocation Awards PY 21		-	-	-	-	-	-
8	<b>Total Funding Sources</b>	\$ 493,972	\$ 1,443,558	\$ 204,631	\$ 396,937	\$ 510,475	\$ 935,591	\$ 173,445
	<b>Expenditures:</b>							
	<b>Consortium Operations:</b>							
9	Retiree Benefits	\$ -	\$ 751,903	\$ -	\$ -	\$ -	\$ -	\$ -
10	Salaries and Benefits	94,090	99,285	126,589	155,237	116,125	217,301	-
11	Services and Supplies	13,350	161,300	15,700	95,600	-	3,000	-
12	Professional Services	27,566	89,280	26,000	67,000	-	-	-
	Earmarked/Encumbered from pervious PY	-	-	\$ -	-	-	-	-
13	<b>Consortium Operations Total</b>	\$ 135,006	\$ 1,101,768	\$ 168,289	\$ 317,837	\$ 116,125	\$ 220,301	\$ -
	<b>Career &amp; Training Services</b>							
	<b>Program Year 2019/2020 WIOA/Other - Rebudget</b>							
14	Non-Allocation Awards	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Placer County	-	-	-	-	-	226,242	-
16	El Dorado County	-	-	-	-	141,676	-	-
17	Alpine County	-	-	-	-	-	-	73,445
	<b>Program Year 2020/2021 WIOA/Other</b>							
18	Non-Allocation Awards	-	-	-	-	\$ -	\$ -	\$ -
19	Placer County	-	-	-	-	\$ -	266,476	\$ -
20	El Dorado County	-	-	-	-	\$ 174,556	\$ -	\$ -
21	Alpine County	-	-	-	-	\$ -	\$ -	\$ 100,000
	<b>Regional Contracts</b>							
22	<b>Career &amp; Training Services Total</b>	\$ -	\$ -	\$ -	\$ -	\$ 316,232	\$ 492,718	\$ 173,445
23	Regional Contracts							
24	<b>Board Initiatives</b>	\$ -	\$ -	\$ 20,000	\$ 18,202	\$ -	\$ 11,798	\$ -
25	PY20 Award Expend in Second Year	\$ 358,966	\$ 191,790	\$ 16,342	\$ 60,898	\$ 78,118	\$ 210,774	\$ -
26	Future Year Expend Non-Allocation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
27	Recommend PY 19/20 WIOA Additional Pension Supp	\$ -	\$ 150,000	\$ -	\$ -	\$ -	\$ -	\$ -
28	<b>TOTAL EXPENDITURES</b>	\$ 493,972	\$ 1,443,558	\$ 204,631	\$ 396,937	\$ 510,475	\$ 935,591	\$ 173,445
29	<b>Net Incorr Funding primarily from unobligated and un</b>	\$ (0)	\$ 0	\$ -	\$ -	\$ (0)	\$ (0)	\$ -

Approved by:  
Executive Committee:  
WB:  
Governing Board:

		<u>H</u>	<u>I</u>	<u>J</u>	<u>K</u>	<u>L</u>	<u>M</u>	<u>N</u>	<u>O</u>
		SB1 High Road	Trade and Economic Transition National Dislocated Worker Grant	DEA 6	Gov's Addition Asst	Covid-NDWG	Prison to Employment Implementation Supportive Services	Prison to Employment Implementation Direct Services	Total of all Funding Sources and Expenditures
#									
	<b>Funding Sources:</b>								
1	Carry-In Allocation Funds from PY 20	0	0	0	0	0	0	0	\$ 1,282,496
2	Allocation Awards PY 21	0	0	0	0	0	0	0	\$ 2,523,547
3	Carry-In Rapid Response/LA	0	0	0	0	0	0	0	56,696
4	Awarded Rapid Response Funds PY 21	0	0	0	0	0	0	0	239,112
6	Awarded Layoff Aversion Funds PY 21	0	0	0	0	0	0	0	56,758
	Carry-In Non-Allocation from PY 20		25627.05		23969	154452	567422	355517	1,126,987
7	Actual Non-Allocation Awards PY 21	1,500,000	19,000	350,000					1,869,000
8	<b>Total Funding Sources</b>	<b>\$ 1,500,000</b>	<b>\$ 44,627</b>	<b>\$ 350,000</b>	<b>\$ 23,969</b>	<b>\$ 154,452</b>	<b>\$ 567,422</b>	<b>\$ 355,517</b>	<b>\$ 7,154,596</b>
	<b>Expenditures:</b>								
	<b>Consortium Operations:</b>								
9	Retiree Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 751,903
10	Salaries and Benefits	130,848	-	108,671	-	74,452	102,341	81,740	1,306,679
11	Services and Supplies	7,075	-	5,227	-	-	15,163	5,000	321,415
12	Professional Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	209,846
	Ermarked/Encumbered from pervious PY								-
13	<b>Consortium Operations Total</b>	<b>\$ 137,923</b>	<b>\$ -</b>	<b>\$ 113,898</b>	<b>\$ -</b>	<b>\$ 74,452</b>	<b>\$ 117,504</b>	<b>\$ 86,740</b>	<b>\$ 2,589,843</b>
	<b>Career &amp; Training Services</b>								
	<b>Program Year 2019/2020 WIOA/Other - Rebudget</b>								
14	Non-Allocation Awards	\$ -	25,627	\$ -	23,969	\$ 80,000	\$ 31,091	\$ -	\$ 160,687
15	Placer County	-	-	-	-	-	-	-	226,242
16	El Dorado County	-	-	-	-	-	-	-	141,676
17	Alpine County	-	-	-	-	-	-	-	73,445
	<b>Program Year 2020/2021 WIOA/Other</b>								
18	Non-Allocation Awards	66,697	19,000	84,857	-	-	-	-	170,554
19	Placer County	-	-	-	-	-	-	-	266,476
20	El Dorado County	-	-	-	-	-	-	-	174,556
21	Alpine County	-	-	-	-	-	-	-	100,000
	<b>Regional Contracts</b>	<b>1,012,000</b>					<b>418,827</b>	<b>268,777</b>	<b>1,699,604</b>
22	<b>Career &amp; Training Services Total</b>	<b>\$ 1,078,697</b>	<b>\$ 44,627</b>	<b>\$ 84,857</b>	<b>\$ 23,969</b>	<b>\$ 80,000</b>	<b>\$ 449,918</b>	<b>\$ 268,777</b>	<b>\$ 3,013,240</b>
23	Regional Contracts								-
24	<b>Board Initiatives</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 50,000</b>
25	PY20 Award Expend in Second Year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 916,888
26	Future Year Expend Non-Allocation	\$ 283,380	\$ -	\$ 151,245	\$ -	\$ -	\$ -	\$ -	\$ 434,625
27	Recommend PY 19/20 WIOA Additional Pension Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150,000
28	<b>TOTAL EXPENDITURES</b>	<b>\$ 1,500,000</b>	<b>\$ 44,627</b>	<b>\$ 350,000</b>	<b>\$ 23,969</b>	<b>\$ 154,452</b>	<b>\$ 567,422</b>	<b>\$ 355,517</b>	<b>\$ 7,154,596</b>
29	<b>Net Incurr Funding primarily from unobligated and unexpended</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>(0)</b>

Approved by:  
Executive Committee:  
WB:  
Governing Board:

**GOLDEN SIERRA  
WORKFORCE BOARD  
EXECUTIVE COMMITTEE**

**MEMORANDUM**

**DATE:** September 17, 2020  
**TO:** Executive Committee (EC)  
**FROM:** Lorna Magnussen, WB Analyst  
**SUBJECT:** Workforce Board Membership

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Before the board for review and recommendation are the following Workforce Board membership updates and applications.

**Resignation(s)**

Jacqui Humenick, Ponte Polmero; representing Business; resigned 3/18/19

Amanda Westphal, Blue Ribbon Personnel Services; representing Business resigned 3/13/20.

April Ballesterro, One Light Ahead; representing Business resigned 3/11/20.

Lisa Hutchinson, Revere Packaging, representing Business, resigned 08/25/20

**Application(s)**

Britt Randall, Azouz Dental Practices, representing Business

Jamie Brown, JB Real Estate Group-Premier Property Management, representing Business

Michael Snead, Sierra Consulting Services, Inc., representing Business.

**Recruitment efforts**

Currently working with Governing Body, Workforce Board and partners to recruit potential replacement. Mass email distribution efforts, staff contacts and Facebook have also been utilized.

**Vacancies**

4 Business Seats

## **MEMBERSHIP APPLICATION FORM**

**Person Nominated:** Britt Azouz **Title:** COO

**Business Name:** Azouz Dental Practices

**Business Address:** 5414 Sunrise Blvd Suite A, Citrus Heights, CA 95610

**Telephone:** 5309132748 **FAX:**  **E-mail:** brittrandall@newvisiondentistry.com

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**Organization submitting nomination:** Metro Chamber  
(ie: Chamber of Commerce, Manufacturing Association, etc.)

**Contact Person:** Andrea **Title:** Executive Director

**Business Address:** One Capitol Mall | Suite 700 | Sacramento, CA 95814

**Telephone:** 916-319-4260 **FAX:**  **E-mail:** [aellinghouse@metrochamber.org](mailto:aellinghouse@metrochamber.org)

**(A letter of nomination is required and must be attached to this application or forwarded under separate cover.)**

**Area of Representation (check all that apply):**

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> <b>Business</b>  | <input type="checkbox"/> <b>Governmental and Economic and Community Development</b> |
| <input type="checkbox"/> <b>Workforce</b>  | <input type="checkbox"/> Economic & Community Development                           |
| <input type="checkbox"/> Labor organizations   | <input type="checkbox"/> Wagner-Peyser Representative                               |
| <input type="checkbox"/> Joint labor-management apprenticeship program or apprenticeship program | <input type="checkbox"/> Vocational Rehabilitation Representative                   |
| <input type="checkbox"/> CBO w/Barrier   | <input type="checkbox"/> Transportation/Housing/Public Assistance                   |
| <input type="checkbox"/> Youth   | <input type="checkbox"/> Philanthropic Organization                                 |
| <input type="checkbox"/> <b>Education &amp; Training</b>   | <input type="checkbox"/> <b>Other</b>   |
| <input type="checkbox"/> Adult Education/Literacy Representative                                 |   |
| <input type="checkbox"/> Higher Education Representative   |   |
| <input type="checkbox"/> Local Ed/CBO w/Training Barrier   |   |

Britt Randall  
**Signature**

8/4/2020  
**Date**

I hereby submit my application for membership on the Local Workforce Development Board to Golden Sierra Job Training Agency. I have completed and included the following: narrative questions, conflict of interest and nomination letter.

Return all information to:

Lorna Magnussen, WB Analyst  
Golden Sierra Job Training Agency  
115 Ascot Drive, Suite 140  
Roseville, CA 95661



## **NARRATIVE QUESTIONS**

### **What specific experience/expertise do you possess which would be of value to the Workforce Development Board?**

I currently manage 6 dental offices in the greater Sacramento area where we employ more than 30 individuals. I am actively involved in nonprofit for such as Junior Achievement and the Loomis Basin Education Foundation. I was a SVP for Commercial Banking at Bank of America where I retired after 20 years. I was past chair and committee member for 10 years for Eskaton's non-profit sector. I was a 2018 Leadership Sacramento Graduate and I am currently a member of The Power of Woman group in Placer County. I have a passion for service and a network to support my areas of focus.

### **Why would you be a good candidate to serve on the Workforce Development Board?**

I love service! It's important that we give back and support the development of others in our community. I have learned a lot over my years in both Small Business and Corporate America that I believe would be valuable.

**You may attach additional information, including your resume or biography. Further questions should be directed to Lorna Magnussen at Golden Sierra Job Training Agency at (916) 773-8544.**

## **CONFLICT OF INTEREST INFORMATION**

1. Does your employer/company provide goods and/or services to Golden Sierra Job Training Agency, or have any plans to provide goods and/or services to Golden Sierra Job Training Agency in the future?      Yes ☐    No ☒    If yes, please describe below:
  
2. You will be setting policy for and possibly allocating funds to community-based organizations, profit and non-profit corporations, school districts and other governmental entities or program operators. Do you or any member of your immediate family have any affiliation with such entities (i.e., ownership; employment; contractual relationships, including Golden Sierra-funded On-the-Job Training (OJT) program participation; commission, board or committee membership)?    Yes ☐    No ☒    If yes, identify below the name of the entity and the nature of the affiliation. (*Immediate family members are: wife, husband, son, daughter, mother, father, brother, brother-in-law, sister-in-law, father-in-law, mother-in-law, aunt, uncle, niece, nephew, step-parent or step-child.*)
  
3. Do you, or any member of your immediate family (as defined above), have any ownership interest in any commercial real property that is currently leased/rented by Golden Sierra Job Training Agency?    Yes ☐    No ☒    If yes, please describe such property by size and location.

**If your nomination or application is approved, you will be required to file a limited conflict of interest form with Golden Sierra Job Training Agency prior to assumption of Workforce Development Board membership.**

Britt Randall  
\_\_\_\_\_  
Signature of Applicant

8/4/2020  
\_\_\_\_\_  
Date

**Qualifications:**

Self-motivated, detail oriented, multi tasking, with an overall emphasis on production and leadership skills. Ability to collaborate with associates, peers and customers to ensure business needs are met while providing an exceptional customer experience. Excellent presentation and communication skills as well as a strong understanding of real world – professional skills needed to be successful.

**Experience:**

**Azouz Dental Practices of Sacramento**

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*Chief Financial Officer- Sacramento: 6 Offices- April 2017-Current*

- Accomplishes finance human resource strategies by determining accountabilities; communicating and enforcing values, policies, and procedures; implementing recruitment, selection, orientation, training, coaching, counseling, disciplinary, and determining communication programs; planning, monitoring, appraising, and reviewing job contributions
- Develops finance organizational strategies by contributing financial and accounting information, analysis, and recommendations to strategic thinking and direction; establishing functional objectives in line with organizational objectives
- Establishes finance operational strategies by evaluating trends; establishing critical measurement; determining production, productivity, quality and customer-service strategies; designing systems; accumulating resources; resolving problems; implementing change
- Develops organization prospects by studying economic trends and revenue opportunities; projecting acquisition and expansion prospects; analyzing organizational operations; identifying opportunities for improvement, cost reduction and system enhancement
- Develops financial strategies by forecasting capital, facilities, and staff requirements; identifying monetary resources; developing action plans
- Monitors financial performance by measuring and analyzing results; initiating corrective actions; minimizing the impact of variances
- Maximizes return on invested funds by identifying investment opportunities; maintaining relationships with the investment community
- Reports financial status by developing forecasts; reporting results; analyzing variances; developing improvements
- Updates job knowledge by remaining aware of new regulations; patriating in educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations
- Manage marketing, advertisement for all offices
- Oversee Regional Manager and their daily task/annual goals

**Bank of America**

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*Senior Vice President- Senior Treasury Management Officer Business Banking/Dealer Finance Services – Territory Coverage:*

*Modesto- Eureka – Fairfield - Reno June 2015-Current*

- Local Dealer Finance Services Treasury Coverage Office.
- Responsible for the sale of Treasury Management solutions to new clients and retention of current client

relationships.

- Develop partnership with Client Managers to jointly generate and grow profitable business.
- Senior level sales position responsible for multiple lines of business or industry segments for commercial entities or professional firms with more complex treasury management needs.
- Develop new business with a designated portfolio of Middle Market prospects and clients.
- Understand the client's business environments, strategies, and industry to provide the best solution for their situation.
- Develop strategic sales plan in coordination with client managers and other colleagues as appropriate.
- Promote sales through frequent client meetings and discussions covering new products, market and industry developments.
- Support the bank's strong relationship banking culture through on-going customer contact, written call reports, quality customer service and superior product knowledge.
- Acquired 86 million in new balances in 2018

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**Bank of America**

*Senior Vice President- Senior Treasury Management Officer US Trust – Territory Coverage:  
Tennessee – West - June 2010-June 2015*

- Partner with US Trust to sell TM services to prospects and develop/execute on annual cross-sell plan for current customers in each team's portfolio
- Responsible for orchestrating customer and prospect calls to expand business relationships. Travel to client locations as needed
- Prepare and present comprehensive sales proposals and presentations/demos to clients in addition to participating and leading product training for various audiences
- Manage all elements of the Treasury Management sales cycle to include business development, prospect qualification, needs analysis, close and implementation of services
- Prepare statement analysis and sales proposals after detailed needs assessment is completed. Maintain strong consultative relationship with clients, particular emphasis on key client base to ensure the growth of the business service charge portfolio of the bank
- Build and maintain relationships with community and civic groups and represent the bank at related events
- Exceeds performer annually
- Highest ranked customer service score on team 2012
- Manage a TM Revenue portfolio valued at over 44 million annually for 1000 clients
- Total TM portfolio including balance revenue current over 100 million annually

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**Bank of America**

*Vice President- Treasury Management- Territory Coverage: 13 States - October 2006-June 2010*

- Cash management advisor to Business clients within the portfolio- approximately 3500 Banking Center's
- Prepares training materials and trained Banking Centers across territory
- Services and sales product line to clients needs
- Exceeds performer annually
- Ability to thrive in a high pace environment and capable of solving problems with little direction
- Extensive working capital management product knowledge, demonstrates ability to assess client needs, possesses strong advisory skills, written and oral presentation skills and the ability to identify potential solutions to meet client needs

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**Bank of America – Citibank**

*Banking Center Manager – Sacramento locations- December 2001-October 2006*

- Manage the sales process in each office and the achievement of banking center goals. Hold each individual accountable to goals and coach them to achieve their goals
- Develop and implement any marketing and promotional strategies that will help to meet goals in banking center. Identify pockets or segments of new account opportunity within market area
- Successfully managed sales goals and P&L statements for each Banking Center I managed while exceeding client service score
- Trained and coached associates to achieve highest performance results
- 1 of 20 associates selected nationally to present service based focus model. Trained associates across 5 states
- Day One Coach: trained new associates on the Bank of America way throughout CA and TX
- Manage, direct and schedule all activities of the banking center office to ensure that all services are made available to customers
- In conjunction with the Assistant Branch Manager, ensure the banking center is operationally sound, all assets of the banking center are protected, and that each associate follows all instructed policies and procedures
- Evaluate subordinates' performance as related to the specific performance plan for the banking center; coach and develop team to performance expectations, and when appropriate make personnel action recommendations

### **Bank of America**

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*Teller, Operations Manager, Personal Banker- Various Banking Centers in Northern CA- 1997-2001*

- Go above and beyond for customers by consistently aspiring to deliver world class customer service
- Drive sales through service by achieving sales and referral goals by developing a positive customer experience
- Build book of business by proactively seeking ways to develop and expand customer relationships in order to contribute towards the branch success
- Maximizing personal productivity through attention to detail, self motivation, and adaptability to achieve branch and personal goals
- Constantly ranked in top 3 for sales in the Sacramento Metro Market Division
- Actively participated in opportunities to expand knowledge, influencing and interpersonal skills
- Strived to provide our customers with outstanding service giving them my full attention while making their business and personal banking my top priority
- Processed customer transactions with speed and efficiency and have the knowledge to make product and service recommendations no matter what role I am supporting in the Banking Center

### **KCRA**

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*Traffic Producer- January 2001-May 2001*

- Initially selected as an intern for my Communication degree from Sacramento State
- Hired to produce traffic after 3 weeks of internship
- Coordinated morning traffic segments with CHP and the Live Copter
- Wrote script for anchors
- Assisted where needed in studio and out on location

### **KNCO**

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*Radio Host- Engineer- Producer- December 1997- 1999*

- Saturday night radio host for FM Country Station
- Sunday morning FM engineer
- Engineer for sports game
- Produced the morning segment for news on the FM/AM station

### **Education:**

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- Diploma in General Education – Nevada Union High School
- Associates in General Education- Sierra College
- Honors Bachelor of Arts in Communication- Minor in Government – Sacramento State University
- Honors Master of Business Administration- Information Technology- University of Phoenix, Rancho Cordova
- Hubbard Business School- Executive Dental Management MBA

### **Non Profit Involvement:**

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- Eskaton Foundation- 2003-December 2014 (Past Chair 2012)
- Vice President Penryn Parent Teacher Council 2013-2015
- Site Council- Greenhill's School – August 2012-June 2013
- Junior Achievement Committee Member 2011- Current (Committee Chair for multiple events)
- Loomis Basin Education Foundation President 2016-2018, 2015 Vice President, 2014-Current Board Member
- Holiday Home Tour Chair 2014, 2015
- Friendship Club Foundation Board Member- February 2015- May 2016
- Eskaton Board of Directors Member 2003- Present
- Current member of LEAD (Leadership, Education, Advocacy and Development) 2015- Current
- Better Money Habits Champion 2017-Current
- Junior Achievement – Classroom educator 2009-Current
- Me-One Camp Volunteer 2015
- Student Leaders Financial Education Mentor- 2017
- LEAD – Co Chair 2019-Current
- Global Recognition Ambassador 2018-Current
- Global Recognition- Co- Leader –Site Experience 2019-Current
- Client Experience National Project team member (manage a work stream of 48 individuals over 3 countries) 2018-Current
- Stock Exchange- Junior Achievement Emcee 2017 & 2019

### **Special Achievement:**

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- Received President Obama's Bronze Volunteer award 2013, 2014, 2015, 2016, 2017, 2018
- Averages 300-350 volunteer hours annually
- Penryn Volunteer of the year 2015
- 2014, 2015, 2016 Bank of America Community Volunteer Honor Roll
- Leadership Sacramento Class of 2018 graduate – Sacramento Metro Chamber
- Pacific Southwest Leadership Council participant 2018-Current
- Life Coach Certification
- CEO Certification 1 & 2 completed



To Whom This May Concern:

I am writing this letter of recommendation for Britt Randall to serve on the Board of Directors for Golden Sierra. Britt was a past member of the 2018 Leadership Sacramento class and is actively involved in her community. She actively worked with the other 39 members of her Leadership Sacramento cohort to create the annual "Rock the Block" event that provides community repairs and improvements in local low-income neighborhoods. Their service event impacted many families in the Oak Park Neighborhood.

Britt would be a valuable member to any nonprofit board.

Thank you,

Andrea Ellinghouse

Executive Director  
Sacramento Metro Chamber Foundation  
aellinghouse@metrochamber.org  
916-224-6564

## **MEMBERSHIP APPLICATION FORM**

**Person Nominated:** Jamie Brown

**Title:** Broker, Owner

**Business Name:** JB Real Estate Group – Premier Property Management

**Business Address:** 6150 Horseshoe Bar Rd. Loomis CA 95650

**Telephone:** 916-865-7897 **FAX:** 916-652-4414 **E-mail:** JMBRealEstatePro@gmail.com

**Organization submitting nomination:** Chamber of Commerce

(ie: Chamber of Commerce, Manufacturing Association, etc.)

**Contact Person:** Becky Bell

**Title:** Office Manager

**Business Address:** 3700 Rocklin Rd. Rocklin CA 95765

**Telephone:** 916-624-2548 **FAX:** **E-mail:** becky@rocklinchamber.com

**(A letter of nomination is required and must be attached to this application or forwarded under separate cover.)**

### **Area of Representation (check all that apply):**

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> <b>Business</b>  | <input type="checkbox"/> <b>Governmental and Economic and Community Development</b> |
| <input type="checkbox"/> <b>Workforce</b>  | <input type="checkbox"/> Economic & Community Development                           |
| <input type="checkbox"/> Labor organizations   | <input type="checkbox"/> Wagner-Peyser Representative                               |
| <input type="checkbox"/> Joint labor-management apprenticeship program or apprenticeship program | <input type="checkbox"/> Vocational Rehabilitation Representative                   |
| <input type="checkbox"/> CBO w/Barrier   | <input type="checkbox"/> Transportation/Housing/Public Assistance                   |
| <input type="checkbox"/> Youth   | <input type="checkbox"/> Philanthropic Organization                                 |
| <input type="checkbox"/> <b>Education &amp; Training</b>   | <input type="checkbox"/> <b>Other</b>   |
| <input type="checkbox"/> Adult Education/Literacy Representative                                 |   |
| <input type="checkbox"/> Higher Education Representative   |   |
| <input type="checkbox"/> Local Ed/CBO w/Training Barrier   |   |



Signature

7.15.2020

Date

I hereby submit my application for membership on the Local Workforce Development Board to Golden Sierra Job Training Agency. I have completed and included the following: narrative questions, conflict of interest and nomination letter.

Return all information to:

Lorna Magnussen, WB Analyst



## **NARRATIVE QUESTIONS**

### **What specific experience/expertise do you possess which would be of value to the Workforce Development Board?**

I am a Real Estate Broker with a local business in sales, both commercial and residential, as well as property management of investment properties. My roots are in Placer County as the first graduating class of Woodcreek High School. I went on to attend Sierra College studying Civil Engineering, Architecture, and Environmental Sustainability. My passion for architecture and home development was a natural drive towards a real estate career.

Licensed since 2006, I also developed my professional career with the City of Rocklin's Finance Department as well as Placer County Water Agency. My inner knowledge of local municipalities makes me a broad resource for the community and development. My current business keeps me on the cutting edge of business practices as well as what is going on in the community.

### **Why would you be a good candidate to serve on the Workforce Development Board?**

I would be a great candidate because I have experience to draw from that would be implemental in providing input on workforce development for students and job seekers alike.

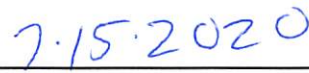
**You may attach additional information, including your resume or biography. Further questions should be directed to Lorna Magnussen at Golden Sierra Job Training Agency at (916) 773-8544.**

## CONFLICT OF INTEREST INFORMATION

1. Does your employer/company provide goods and/or services to Golden Sierra Job Training Agency, or have any plans to provide goods and/or services to Golden Sierra Job Training Agency in the future? Yes ☐ No ☒ If yes, please describe below:
  
2. You will be setting policy for and possibly allocating funds to community-based organizations, profit and non-profit corporations, school districts and other governmental entities or program operators. Do you or any member of your immediate family have any affiliation with such entities (i.e., ownership; employment; contractual relationships, including Golden Sierra-funded On-the-Job Training (OJT) program participation; commission, board or committee membership)? Yes ☐ No ☒ If yes, identify below the name of the entity and the nature of the affiliation. (*Immediate family members are: wife, husband, son, daughter, mother, father, brother, brother-in-law, sister-in-law, father-in-law, mother-in-law, aunt, uncle, niece, nephew, step-parent or step-child.*)
  
3. Do you, or any member of your immediate family (as defined above), have any ownership interest in any commercial real property that is currently leased/rented by Golden Sierra Job Training Agency? Yes ☐ No ☒ If yes, please describe such property by size and location.

**If your nomination or application is approved, you will be required to file a limited conflict of interest form with Golden Sierra Job Training Agency prior to assumption of Workforce Development Board membership.**

  
\_\_\_\_\_  
Signature of Applicant

  
\_\_\_\_\_  
Date

**Scott Yuill Insurance & Financial Services, Inc.  
2160 Sunset Boulevard, Suite 504  
Rocklin, California 95765**

July 28, 2020

Golden Sierra Workforce Board  
115 Ascot Drive, Suite 140  
Roseville, California 95661

To whom it may concern:

I write this letter as a personal and professional reference—and endorsement—of Jamie Brown, whom I've known and worked with in many capacities since 2006.

As a business owner in Rocklin for 32 years and former elected councilmember and mayor of the City of Rocklin from 2006 through 2018, I came to know Jamie while working for Rocklin in the Finance Department from 2007 to 2010. In my same capacity, I also worked with Jamie while she worked for the Placer County Water Agency from 2011 to 2017. On all accounts, I witnessed professionalism and tremendous work ethic.

More recently, and until now, my relationship with Jamie stemmed from her real estate career—primarily her work with Delta Star Management. While there, she personally assisted me and my family managing rental properties. On several occasions, I worked directly with her when dealing with difficult tenants and general rental-property-management needs. She has a knack for working well with people, always demonstrating proficiency with an abundance grace and knowledge. She has tremendous “people skills,” and I received many compliments over the years because of her.

I am also familiar with Jamie's service in the community. I'm aware of her involvement with the Rocklin Area Chamber of Commerce and the Roseville Area Chamber of Commerce, particularly her role serving in the Roseville Leadership program. I'm also aware that she has earned numerous professional awards and accolades.

Knowing the mission and vision of Golden Sierra Workforce Board, I'm confident that with Jamie's background, skill sets, and devotion to the community, she would be a marvelous addition to the Board.

I'm available anytime for a call. Good luck with your organization's endeavors (especially through these challenging times). I can be reached directly at (916) 804-9194.

Sincerely,



Scott Yuill, ChFC®, RICP®



AREA CHAMBER OF COMMERCE

*Promoting business, building community*

July 24, 2020

Jamie Brown with the JB Real Estate Group has been a Rocklin Chamber member since 2020. JB Real Estate Group is currently a member in good standing with the Rocklin Area Chamber of Commerce.

Jamie Brown is a Placer County and Sacramento native giving her a regional appreciation for economic and workforce needs. Experienced and knowledgeable realtors play a key role in supporting our quality of life and attracting a skilled workforce.

It is a privilege to have Jamie Brown as a Rocklin Chamber member.

Sincerely,

A handwritten signature in blue ink that reads 'Robin Trimble, CEO'.

Robin Trimble, CEO

## **MEMBERSHIP APPLICATION FORM**

**Person Nominated:** Michael Snead **Title:** President

**Business Name:** Sierra Consulting Services, Inc.

**Business Address:** 2531 Merrychase Dr., Ste. 200., Cameron Park, CA 95682

**Telephone:** 916.220.4845 **FAX:** N/A **E-mail:** mike@sierraconsultingsvcs.com

**Organization submitting nomination:** Sacramento Professional Area Network (SPAN)  
(ie: Chamber of Commerce, Manufacturing Association, etc.)

**Contact Person:** Steven Zeller **Title:** President

**Business Address:** 11335 Gold Express Dr., Ste 155, Gold River, CA 95670

**Telephone:** 916.320.9834 **FAX:**  **E-mail:** szeller@zellerkern.com

**(A letter of nomination is required and must be attached to this application or forwarded under separate cover.)**

**Area of Representation (check all that apply):**

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> <b>Business</b>  | <input type="checkbox"/> <b>Governmental and Economic and Community Development</b> |
| <input type="checkbox"/> <b>Workforce</b>  | <input type="checkbox"/> <b>Economic &amp; Community Development</b>                |
| <input type="checkbox"/> Labor organizations   | <input type="checkbox"/> Wagner-Peyser Representative                               |
| <input type="checkbox"/> Joint labor-management apprenticeship program or apprenticeship program | <input type="checkbox"/> Vocational Rehabilitation Representative                   |
| <input type="checkbox"/> CBO w/Barrier   | <input type="checkbox"/> Transportation/Housing/Public Assistance                   |
| <input type="checkbox"/> Youth   | <input type="checkbox"/> Philanthropic Organization                                 |
| <input type="checkbox"/> <b>Education &amp; Training</b>   | <input type="checkbox"/> <b>Other</b>   |
| <input type="checkbox"/> Adult Education/Literacy Representative                                 |   |
| <input type="checkbox"/> Higher Education Representative   |   |
| <input type="checkbox"/> Local Ed/CBO w/Training Barrier   |   |

  
Signature

8.24-20  
Date

I hereby submit my application for membership on the Local Workforce Development Board to Golden Sierra Job Training Agency. I have completed and included the following: narrative questions, conflict of interest and nomination letter.

Return all information to:

Lorna Magnussen, WB Analyst  
Golden Sierra Job Training Agency  
115 Ascot Drive, Suite 140  
Roseville, CA 95661

## NARRATIVE QUESTIONS

### **What specific experience/expertise do you possess which would be of value to the Workforce Development Board?**

I own Sierra Consulting Services which is a consulting company for California companies seeking Employment Training Funds (ETP). ETP is a state agency dedicated to helping California-based companies increase their competitiveness against out-of-state competitors by reimbursing training costs. I have been in business for over 8 years and have procured several million dollars in ETP reimbursement for my clients. As such, I am well acquainted with the benefits of government sponsored training and how it helps strengthen businesses by giving employees skills they need in order to get a job or further their career. With ETP, we look to see if the company will be training on soft and hard skills which are categorized into business skills, commercial skills, computer skills, manufacturing skills, process improvement skills and safety/OSHA skills. We also look to see how the training is delivered such as in-person classroom instruction, virtual (Zoom, Go To Meeting), On-the-Job, or computer based training. The feedback from my clients has been overwhelmingly positive. They all participate in ETP for the training reimbursement but, for many, the benefits go beyond financial returns. For many of my clients, ETP has helped them improve their sales, product quality, and customer service. It has also helped companies with their ERP implementation, or go international with language conversions and global shipping, or improve their domestic logistics, or change and improve their procedures and processes to go LEAN or paperless or digital.

Furthermore, my business has benefitted from hiring employees from the Folsom Cordova Community Partnership when the company was located in Sacramento county. A non profit similar to Golden Sierra that receives public grant money for helping disadvantaged or challenged adults who are trying to enter the workforce. One employee is still with me after 6 ½ years. She was my first employee from Folsom Cordova Community Partnership and we were able to give her On-The-Job training thanks to the program. She is very bright and has helped develop and implement several processes and procedures which we still use today. We hired a second employee from the Folsom Cordova Community Partnership who was a recent immigrant from Afghanistan. He had an emergency visa to come to America because his life was threatened for helping the American army against the Taliban. We gave him On-The-Job training and he worked for us for a while. He decided to change careers and become an electrician. During our last conversation, he said that he is going through the apprenticeship program to become a journeyman. The new job will be able to support his wife and 2 daughters. I was very grateful to help him find a job at my company after coming to America and then to help him find his dream job as an electrician.

Prior to starting Sierra Consulting Services, I had many years of developing business plans for newly formed and young companies. I also raised over \$25 million for start up capital for venture capital companies as well as commercial real estate projects. I also worked with Cal State Northridge in starting their Entrepreneurship program. I also worked with a local non-profit in Placer County that helps at-risk youth who have aged-out of the foster program develop both life skills and professional skills. The high success rate for these former foster youths to find and hold a steady job after a year-long program was very encouraging. It was also encouraging to see companies work with the non-profit to give these young adults additional on-the-job training and new skills.

**Why would you be a good candidate to serve on the Workforce Development Board?**

I believe in the mission of the Workforce Development Board. I have personally experienced the benefits from working with public/private partnerships and have seen how these partnerships with WIBs and ETP can help businesses succeed. And, I have also seen with my own employees and foster youth how their personal and family's lives can change for the better as they have been sponsored by public and non-profit funds while working for private companies.

**You may attach additional information, including your resume or biography. Further questions should be directed to Lorna Magnussen at Golden Sierra Job Training Agency at (916) 773-8544.**

## CONFLICT OF INTEREST INFORMATION

1. Does your employer/company provide goods and/or services to Golden Sierra Job Training Agency, or have any plans to provide goods and/or services to Golden Sierra Job Training Agency in the future? Yes ☐ No ☒ If yes, please describe below:
  
2. You will be setting policy for and possibly allocating funds to community-based organizations, profit and non-profit corporations, school districts and other governmental entities or program operators. Do you or any member of your immediate family have any affiliation with such entities (i.e., ownership; employment; contractual relationships, including Golden Sierra-funded On-the-Job Training (OJT) program participation; commission, board or committee membership)? Yes ☒ No ☐ If yes, identify below the name of the entity and the nature of the affiliation. *(Immediate family members are: wife, husband, son, daughter, mother, father, brother, brother-in-law, sister-in-law, father-in-law, mother-in-law, aunt, uncle, niece, nephew, step-parent or step-child.)*  
  
I have an active employee at my consulting company that is participating in Golden Sierra's On-the-Job Training Program. My company will be receiving training reimbursement for 10 weeks for 50% of the employee's pay. We are currently 5 weeks into the 10 week period.
  
3. Do you, or any member of your immediate family (as defined above), have any ownership interest in any commercial real property that is currently leased/rented by Golden Sierra Job Training Agency? Yes ☐ No ☒ If yes, please describe such property by size and location.

**If your nomination or application is approved, you will be required to file a limited conflict of interest form with Golden Sierra Job Training Agency prior to assumption of Workforce Development Board membership.**

  
\_\_\_\_\_  
Signature of Applicant

8.24.20  
\_\_\_\_\_  
Date





Sacramento  
Professional Advisors  
Network

August 24<sup>th</sup>, 2020  
Lorna Magnussen, WB Analyst  
Golden Sierra Job Training Agency  
115 Ascot Drive, Suite 140  
Roseville, CA 95661

RE: Recommendation of Michael Snead

Dear Lorna:

I am writing to formally recommend Michael Snead to be considered for a position on the board of the Golden Sierra Job Training Agency.

Michael has been an active member of the Sacramento Professional Advisors Network since 2018, and is a member and participant in the Roseville group, within Placer County, CA.

The Sacramento Professional Advisors Network is a non-profit organization that is comprised of vetted accomplished professionals that serve business owners within the Sacramento region. Currently, SPAN is approximately 60 members strong, and has three established groups including the Downtown Group, Folsom Group, and the Roseville Group.

The purpose of SPAN is to serve as a platform to provide professional growth, collaboration, build strong trusted relationships with fellow members, generate referrals to help each other succeed, and generate results in ways that make a positive difference for our business owner clients, and the local business community.

Mike has been a dedicated member of the Roseville Group by providing informative presentations on ETP agency funds and how ETP can help California companies increase their skill sets. He has also actively made referrals to several SPAN members and connected his clients to key SPAN members, enabling them to make a positive difference for them.

Michael has carried himself in a professional manner during our SPAN monthly meetings and has demonstrated good communication skills and a friendly disposition. Therefore, I feel that he would be a positive, contributing member of your board.

If you have any questions, please feel free to email me or contact me at the phone numbers listed below.

Very truly yours,

Steven Zeller  
President, Sacramento Professional Advisors Network  
CFP, AIF, CExP, Senior Wealth Advisor of Zeller Kern Wealth Advisors  
[szeller@zellerkern.com](mailto:szeller@zellerkern.com)  
916-320-9834

# **GOLDEN SIERRA AJCC MOU PARTNERS MEETING**

**September 16, 2020**

**2:00-3:30 PM**

**Call-in meeting**

Join Zoom Meeting  
<https://us02web.zoom.us/j/84801968373>

## **AGENDA**

- 1. Introductions and Greetings**
- 2. One-Stop Operator Remarks**
- 3. Agency COVID-19 Updates**
  - Current Situation/funding**
  - Case Management of Participants**
  - Serving New Customers**
  - EDD Information Notice 20-07 “Reopening Career Centers”**
- 4. MOU/CSA Updates**
- 5. Agency Announcements**
- 6. Next Meeting**