



**OAKLAND  
WORKFORCE DEVELOPMENT BOARD  
FULL BOARD MEETING**

**THURSDAY, NOVEMBER 7, 2024**

8:30 a.m. – 11:00 a.m.

Hearing Room #4

Oakland CA City Hall





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# **OAKLAND WORKFORCE DEVELOPMENT BOARD (OWDB)**

## **FULL BOARD MEETING NOTICE**

**Thursday November 7, 2024**

8:30 a.m. – 11:00 a.m.

Hearing Room 4

Oakland City Hall

One Frank H. Ogawa Plaza

Pursuant to the Governor's Executive Order N-29-20, all members of the Oakland Workforce Development Board and City Staff will join the meeting via phone/video conference and no teleconference locations are required.

### **PUBLIC PARTICIPATION**

The public may observe and/or participate in this meeting many ways.

**OBSERVE: To observe the meeting by video conference**, please click on this link:

<https://us06web.zoom.us/j/89398087531?pwd=GVXgkyEubNnNUadltAoTPMX5T4tIEs.1> noticed meeting time. Instructions on how to join a meeting by video conference is available at: <https://support.zoom.us/hc/en-us/articles/201362193-joining-a-Meeting>

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<https://us06web.zoom.us/j/89398087531?pwd=GVXgkyEubNnNUadltAoTPMX5T4tIEs.1>

**Webinar ID: 893 9808 7531 Passcode: 580212**

International numbers available: <https://us06web.zoom.us/u/kcDBKV2rP8>

### **COMMENT:**

**Public comment is not available for remote participation at this time. If you would like to comment on an item remotely, please submit written comments 24 hours in advance by email to [owdb@oaklandca.gov](mailto:owdb@oaklandca.gov) or appear in person.**

If you have any questions, please email: [owdb@oaklandca.gov](mailto:owdb@oaklandca.gov)

# **OAKLAND WORKFORCE DEVELOPMENT BOARD (OWDB)**

## **FULL BOARD MEETING NOTICE**

City Hall, 1 Frank H. Ogawa Plaza, Oakland, CA  
**Hearing Room 4**

Thursday, November 7, 2024  
8:30 a.m. – 11:00 a.m.

## **AGENDA**

*Members of the public wishing to address the Board on issues shall complete a Speakers Card. Members of the public who wish to address the Board on published issues should do so at the time the agenda item is being discussed. Issues that the public wishes to address that are not published on the agenda will be heard during the Public Forum section. You will have 2-minutes to speak on the item.*

### **I. PROCEDURAL ITEMS**

- a. Call to Order and Roll Call
- b. Chair Remarks
- c. Approval of Minutes (Action) – August 1, 2024

### **II. ACTION ITEMS**

- a. Conduct Chair, Vice-Chair and Executive Committee Nominations and Elections
- b. Authorize a \$100,000 Grant Agreement with the City and County of San Francisco for the Bay Area Jobs First Collaborative Sub-Regional Alameda County Table FY 24-25
- c. Authorize a \$25,000 Grant Agreement with the James Irvine Foundation for Capacity Building Initiative for FY 24-25

### **III. INFORMATIONAL ITEMS**

- a. Discuss Strategic Plan Key Elements
- b. Performance Reports
  - i. WIOA Adult, Dislocated Worker and Youth PY 23-24
  - ii. Summer Youth Employment Program (SYEP) 2024 Outcomes & Provider Presentations
- c. Draft Film Rebate Program Regulations

### **IV. PUBLIC FORUM**

For items that members of the public wish to address that are NOT on the agenda.

### **V. STAFF REPORTS**

### **VI. ANNOUNCEMENTS**

### **VII. CLOSING REMARKS & ADJOURN**

**NEXT SCHEDULED FULL BOARD MEETING**  
**THURSDAY, FEBRUARY 6, 2025**  
**8:30 AM-11:00 AM**

*These WIOA Title I financially assisted programs or activities are "Equal Opportunity Employers/Programs". Auxiliary aids and services are available upon request to individuals with disabilities*

# OAKLAND WORKFORCE DEVELOPMENT BOARD (OWDB)

**Full Board Meeting  
Thursday, August 1, 2024  
8:30 AM – 11:30 AM**

## MINUTES

The full board meeting was called to order by **Chair Ahmed Ali Bob** at 8:44 a.m.

**Roll Call:** Ahmed Ali Bob, Jason Gumataotao, Della Randolph, Kalpana Oberoi, Ching Wang, Pete May, Aaron Johnson, September Hargrove, Louis Quindlen, Kim Jones, Megan Nazareno, Tatiana Newman-Wade, Rudy Besikof, Lee McMurtray, (Quorum Established)

**Excused:** Peter Gamez

**Absent:** Rudy Besikof, Omar Sabeh, Jason Gumataotao, Louis Quindlen

**Board Chair Ahmed Ali Bob** stated that members of the public who wish to address the board on items noticed on the agenda, should complete a speaker card before the agenda item is discussed. Each speaker will have two minutes to speak on the item. Staff will be keeping time and will notify you when your two minutes are complete. Currently, public comment is not available for remote participation. The public may address, items not published on the agenda, during the Public Forum section, at the end of the meeting.

### APPROVAL OF AGENDA

**Chair Ahmed Ali Bob** called for adoption of the agenda.

### APPROVAL OF MINUTES - ACTION

**Board Chair Ahmed Ali Bob** called for a motion to approve the minutes of May 2, 2024, and June 28, 2024.

**Board Member Aaron Johnson** moved **Board Member Pete May** seconded to approve the minutes for the May 2, 2024, meeting.

**Motion Passed:** Ahmed Ali Bob, Lee McMurtray, Della Randolph, Kalpana Oberoi, Ching Wang, Pete May, Aaron Johnson, September Hargrove, Kim Jones, Megan Nazareno, Tatiana Newman-Wade.

**All Ayes - 11**

**Board Member Della Randolph** moved **Board Member Lee McMurtray** seconded to approve the minutes of June 28, 2024, with correction.

## OAKLAND WORKFORCE DEVELOPMENT BOARD (OWDB)

**Motion Passed:** Ahmed Ali Bob, Lee McMurtray, Della Randolph, Kalpana Oberoi, Ching Wang, Pete May, Aaron Johnson, September Hargrove, Kim Jones, Megan Nazareno, Tatiana Newman-Wade.

**Ayes – 10**

**Abstention – Aaron Johnson**

### ITEM II.a. – ACTION

**Chair Ahmed Ali Bob** read the recommendation stating that the authorized grant agreement with Black Cultural Zone Community Development Corporation (BCZ) is in an amount not to exceed \$71,420.00 for FY 2024-2025.

Staff Member Dovey gave background and noted that this item was first introduced at the June 28, 2024, Board meeting. After discussion, the Board decided to invite a representative from BCZ to provide further insights for adoption and approval. Andrea Gibson, Portfolio Manager at BCZ, presented a PowerPoint overview covering their mission statement, history, partners, and community projects. She addressed the concerns raised by Board members during the June 28 meeting.

**Public Comment: None**

**Board Member September Hargrove** made several inquiries: Who is administrating the career pathways? What do those pathways look like? Are there any in-house services offered? What is the timeframe to engage an applicant after filling out the interest form? What are the insights that BCZ learned in the last two years to better identify candidates?

**Board Member Kim Jones** asked, given the challenges with the paperwork, have any additional strategies been implemented to streamline the process or provide more support?

**Board Member Ching Wang** asked what was the total funding received for the prior two years? Wang stated, the BCZ success rate is 8%, which is below the required 10 applicants per year. BCZ is going into its third year currently and have 7 participants who have completed the process from beginning to end. When was the money allocated and what was it used for?

Andrea Gibson stated that BCZ is paid by what is invoiced. They do not receive the awarded amount in full, only what is invoiced.

**Board Member Aaron Johnson** requested clarification on prior BCZ funding? He inquired if prior to this cycle what was the track record and what is the appropriate timeframe for a new provider to become acclimated to the process?

**Board Member Della Randolph** shared that working with communities that are under served means you are starting below the line of what people may expect. Youth services impact the future of those communities surviving. The key to that is to keep moving forward, be encouraged and stay the course.

## OAKLAND WORKFORCE DEVELOPMENT BOARD (OWDB)

**Executive Director Sofia Navarro** stated that the BCZ received a cost reimbursement grant, it operates on a three- year cycle. They submit an invoice for reimbursement for work done. Workforce does not count applicants until they have completed the onboarding process and have been entered into Cal jobs.

**Chair Ahmed Ali Bob** requested a motion to accept the recommendation for BCZ.

**Board Member Lee McMurtray** moved **Board Member Della Randolph** second authorizing adoption and approval of grant not to exceed \$71,420.00 FY 24-25.

**Motion Passed:** Ahmed Ali Bob, Lee McMurtray, Kalpana Oberoi, Aaron Johnson, Tatiana Newman-Wade, September Hargrove, Kim Jones, Megan Nazareno, Pete May, Della Randolph, Ching Wang

**Ayes - 10**

**Abstention – Kim Jones**

### IV. INFORMATIONAL ITEMS

#### a. Marine Trade and Water Transportation

Bobby Winston, President & CEO, and Sal Vaca, Project Director, delivered a presentation on the Working Waterfront Coalition. They provided a list of the Coalition's Industry Board and its members, highlighting partnerships with the Alameda, Contra Costa, and Solano Workforce Development Boards. They also discussed various grants received and current job opportunities the waterfront is actively recruiting for: Water Transportation-deck hands, station agents, captain assistants, captains, Career Technical Education-H.S, Welding & Machine Classes partnering with OUSD and Richmond, he stated that there is a shortage of qualified applicants, lack of training, partnerships or pathways into the ship maintenance repair & water transportation industry, how to leverage local, state, federal funds for infrastructure, long-term goal for offshore wind energy generation.

**Public Comment: None**

**Board Member Kim Jones** inquired about the community engagement strategies to disseminate information to the public. He asked about the application process, noting that 125 applications were received and only 20 were accepted, he questioned what the requirements are in place, to better prepare others to receive the same opportunities.

### IV. INFORMATIONAL ITEMS

#### b. Director's Report

Sofia Navarro, Executive Director of the OWDB presented an update on the City's budget, Mayor's proposed mid-cycle budget, Grants & Initiatives, Rapid Response Sessions, staff

## **OAKLAND WORKFORCE DEVELOPMENT BOARD (OWDB)**

site visits, Business & Workforce synergies, and current efforts, and OWDB strategic plan timeline.

**V. PUBLIC FORUM:** None

(For items that members of the public wish to address that are NOT on the agenda)

**VI. STAFF REPORTS:** None

**VII. ANNOUNCEMENTS:** None

**VIII. CLOSING REMARKS & ADJOURN**

**Chair Ahmed Ali Bob** thanked everyone for attending the meeting, and informed everyone of the next full board meeting.

### **NEXT SCHEDULED FULL BOARD MEETING**

**Thursday, November 7, 2024  
Hearing Room #4  
8:30 AM-11:00 AM**

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*Auxiliary aids and services are available upon request to individuals with disabilities.*





## ITEM II.b. - ACTION



**To: Oakland Workforce Development Board**  
**From: OWDB Staff**  
**Date: November 7, 2024**  
**Re: Bay Area Jobs First Collaborative Sub-Regional Alameda County**

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### **RECOMMENDATION**

**A Resolution Of The Oakland Workforce Development Board (OWDB) To Execute A Grant Agreement With the City and County of San Francisco In an Amount Not To Exceed One Hundred Thousand Dollars (\$100,000) To Provide Services for the Bay Area Jobs First Collaborative Sub-Regional Alameda County Table For Fiscal Year 2024-2025.**

### **EXECUTIVE SUMMARY**

In 2022 the Bay Area High Road Transition Collaborative, a new group of 52 organizations led by All Home and the Bay Area Good Jobs Partnership for Equity, which consists of nine bay area workforce boards, were awarded a \$5 million Community Economic Resilience Fund planning grant by the Governor’s Office of Planning and Research to develop and implement inclusive, sustainable economic strategies in the Bay Area.

The Community Economic Resilience Fund (CERF), now known as the California Jobs First Initiative, is a \$600 million fund to build a more environmentally sustainable and equitable economy across California over the next several years, with a focus on historically marginalized communities.

The purpose of California Jobs First is to:

- Support the development of inclusive regional planning processes that produce roadmaps for economic development efforts that prioritize the creation of accessible, high-quality jobs in sustainable industries.
- Invest in projects proposed by regional planning tables that meet criteria for equity, job quality, and sustainability, among others.
- Align and leverage state, federal, philanthropic and private-sector investments in regions to maximize economic development efforts and advance a carbon-neutral economy.

The State is funding planning processes in 13 regions, including the Bay Area, to advance “high-road economic development,” which supports environmentally sustainable businesses that pay living wages and create opportunities for career growth.

As part of this initiative, the OWDB shall be a Sub-Regional Fiscal lead for the Alameda County Table and will provide guidance and technical assistance to the Bay Area Jobs First Collaborative grantees. The goal of the project is to build a sustainable and equitable economy across California, with a focus on supporting new strategies to diversify local economies and develop industries that create high-quality, broadly accessible jobs for all Californians in the transition to a carbon-neutral economy. CJF supports the planning and development of high-road economic development plans to create equitable access to quality jobs. High-road economic development supports environmentally sustainable businesses that pay living wages and create opportunities for career growth.

# OAKLAND WORKFORCE DEVELOPMENT BOARD

## RESOLUTION NO. 24-\_\_\_\_\_

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### **A RESOLUTION AUTHORIZING THE EXECUTION OF A GRANT AGREEMENT WITH THE CITY AND COUNTY OF SAN FRANCISCO IN AN AMOUNT NOT TO EXCEED ONE HUNDRED THOUSAND DOLLARS (\$100,000) TO PROVIDE SERVICES FOR THE BAY AREA JOBS FIRST COLLABORATIVE SUB-REGIONAL ALAMEDA COUNTY TABLE FOR FISCAL YEAR 2024-25**

**WHEREAS**, the Oakland Workforce Development Board (Board) is mandated to oversee the expenditure of federal Workforce Innovation and Opportunity Act of 2014 (WIOA) funding in partnership with the Mayor as local chief elected official in a designated workforce development area such as the City of Oakland (City), and the Mayor has designated the City Administrator to act on the Mayor's behalf on all WIOA administrative matters; and

**WHEREAS**, the Board's budget is made up of multiple funding streams that support the City's workforce development efforts; and

**WHEREAS**, the City is committed to enhancing career opportunities for its residents particularly for those in underserved and underrepresented communities; and

**WHEREAS**, the Bay Area High Road Transition Collaborative, consisting of 52 organizations and led by All Home and the Bay Area Good Jobs Partnership for Equity, has been awarded a \$5 million Community Economic Resilience Fund (CERF) planning grant by the Governor's Office of Planning and Research to develop and implement inclusive, sustainable economic strategies in the Bay Area; and

**WHEREAS**, the CERF, now known as the California Jobs First Initiative (CJF), is aimed at building a more environmentally sustainable and equitable economy across California, with a focus on historically marginalized communities; and

**WHEREAS**, the goals of the California Jobs First Initiative include (1) supporting the development of inclusive regional planning processes that produce roadmaps for economic development efforts that prioritize accessible, high-quality jobs in sustainable industries; (2) investing in projects proposed by regional planning tables that meet criteria for equity, job quality, and sustainability; and (3) aligning and leveraging state, federal, philanthropic, and private-sector investments in regions to maximize economic development efforts and advance a carbon-neutral economy; and

**WHEREAS,** the Board has been selected to serve as a Sub-Regional Fiscal Lead for the Alameda County Table, which is part of the Bay Area Jobs First Collaborative, and will provide guidance and technical assistance to grantees in alignment with the goals of the CJF initiative; and

**WHEREAS,** the funds will be used to support the planning and implementation of high-road economic development strategies, focusing on the creation of high-quality, accessible jobs and the diversification of local economies in the transition to a carbon-neutral economy; and

**WHEREAS,** on October 18, 2024, the City and County of San Francisco adopted Ordinance No. 243-24 retroactively authorizing its Office of Economic and Workforce Development to accept and expend a grant in the amount of \$14,000,000 from the California Economic Development Department for the California Jobs First Catalyst Program, for the grant period of May 1, 2024, through September 30, 2026, which includes a grant to the Oakland Workforce Development Board in the amount of One Hundred Thousand Dollars (\$100,000); now, therefore, be it

**RESOLVED:** That the Board authorizes the execution of a grant agreement between the City of Oakland and the City and County of San Francisco in an amount not to exceed One Hundred Thousand Dollars (\$100,000) to provide services for the Bay Area Jobs First Collaborative Sub-Regional Alameda County Table for Fiscal Year 2024-2025; and be it

**FURTHER RESOLVED:** That the Board authorizes staff to provide services, guidance, and technical assistance as a Sub-Regional Fiscal Lead for this initiative; and be it

**FURTHER RESOLVED:** That the Board commits to supporting inclusive, high-road economic development efforts to build a sustainable and equitable economy across Alameda County and the Bay Area; and be it

**FURTHER RESOLVED:** That the Board is authorized to take actions with respect to such agreements consistent with this Resolution and its basic purposes, subject to review and approval by the City Attorney's Office as counsel to the Board.

PASSED BY THE FOLLOWING VOTE:

AYES -

NOES –

ABSENT –

ABSTENTION –



## ITEM II.c. - ACTION



**To:** Oakland Workforce Development Board  
**From:** OWDB Staff  
**Date:** November 7, 2024  
**Re:** James Irvine Foundation \$25,000 Grant

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### **RECOMMENDATION**

**A Resolution Of The Oakland Workforce Development Board (OWDB) Authorizing a Grant Agreement With The James Irvine Foundation In An Amount Not To Exceed Twenty-Five Thousand Dollars (\$25,000) For Capacity Building Initiatives for Fiscal Year 2024-2025.**

### **EXECUTIVE SUMMARY**

The James Irvine Foundation (JIF) provided a one-time grant in the amount of Twenty-Five Thousand Dollars (\$25,000) to four Bay Area workforce development boards for their participation in JIF's Repair Research project. The City of Oakland's Workforce Development Board (OWDB) was a participant of this research and will receive Twenty-Five Thousand Dollars (\$25,000). The funds received will support capacity building for the OWDB which include the following objectives:

#### **Objectives**

1. Create a cohesive strategy that aligns economic and workforce development goals.
  - a. **Outcome:**
    - i. Develop a comprehensive plan that integrates economic development and workforce development goals.
2. Foster cross-sector collaboration among government, education, business, and community stakeholders that leads to a holistic and more efficient approach to service delivery.
  - a. **Outcome:**
    - i. Create advisory councils comprising representatives from local businesses, educational institutions, non-profits, and community organizations.
3. Address disparities and ensure equitable access to economic opportunities and workforce development resources.
  - a. **Outcome:**
    - i. Ensure economic development initiatives consider the needs of all communities and promote inclusive growth.
4. Enhance capacity by encouraging a culture of innovation and continuous learning within Oakland.
  - a. **Outcome:**
    - i. Provide ongoing training and professional development opportunities for staff, workforce board, and city council members to enhance their skills in integrated development and knowledge in workforce development best practices.

# **OAKLAND WORKFORCE DEVELOPMENT BOARD**

## **RESOLUTION NO. 24-\_\_\_\_\_**

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### **A RESOLUTION AUTHORIZING THE EXECUTION OF A GRANT AGREEMENT WITH THE JAMES IRVINE FOUNDATION IN AN AMOUNT NOT TO EXCEED TWENTY-FIVE THOUSAND DOLLARS (\$25,000) TO SUPPORT CAPACITY BUILDING INITIATIVES FOR FISCAL YEAR 2024-2025**

**WHEREAS**, the Oakland Workforce Development Board (Board) is mandated to oversee the expenditure of federal Workforce Innovation and Opportunity Act of 2014 (WIOA) funding in partnership with the Mayor as local chief elected official in a designated workforce development area such as the City of Oakland (City), and the Mayor has designated the City Administrator to act on the Mayor's behalf on all WIOA administrative matters; and

**WHEREAS**, the Board's budget is made up of multiple funding streams that support the City's workforce development efforts; and

**WHEREAS**, the City is committed to enhancing career opportunities for its residents particularly for those in underserved and underrepresented communities; and

**WHEREAS**, the James Irvine Foundation (JIF) has provided a one-time grant of Twenty-Five Thousand Dollars (\$25,000) to four Bay Area workforce development boards, including the Oakland Workforce Development Board (Board), in appreciation of their participation in JIF's Repair Research project; and

**WHEREAS**, these funds will be used to support capacity building initiatives that align with the Board's mission; and

**WHEREAS**, the following objectives have been outlined to support capacity building efforts including: (1) create a cohesive strategy that aligns economic and workforce development goals; (2) develop a comprehensive plan that integrates economic and workforce development objectives for Oakland; (3) foster cross-sector collaboration among government, education, business, and community stakeholders; (4) establish advisory councils comprising representatives from local businesses, educational institutions, non-profits, and community organizations to enhance service delivery and address the needs of diverse sectors; (5) address disparities and ensure equitable access to economic opportunities and workforce development resources; (6) promote initiatives that prioritize inclusivity, ensuring that economic development strategies consider and address the needs of marginalized communities for equitable growth; (7) enhance capacity by encouraging a culture of innovation and continuous learning; and (8) provide ongoing training and professional development for board staff, board members, and city council

representatives to improve skills in integrated development and stay abreast of workforce development best practices; now, therefore, be it

**RESOLVED:** That the Board accepts and appropriates Twenty-Five Thousand Dollars (25,000) from the James Irvine Foundation for Fiscal Year 2024-2025 to support capacity building; and be it

**FURTHER RESOLVED:** That the Board authorizes staff to oversee the appropriate use of the funds and to provide updates on the progress toward the achievement of the outlined outcomes; and be it

**FURTHER RESOLVED:** That the Board is authorized to take actions with respect to such agreements consistent with this Resolution and its basic purposes, subject to review and approval by the City Attorney's Office as counsel to the Board.

PASSED BY THE FOLLOWING VOTE:

AYES -

NOES –

ABSENT –

ABSTENTION –



Item III.a - Informational



To: Chairman and Members  
Oakland Workforce Development Board

From: Sofia Navarro  
Executive Director

**Subject: Priorities Identified by WDB Members at Board Retreat**

During the strategic planning discussion that was held during the Board Retreat on June 28, 2024, OWDB members identified a series of priorities for its work and for the local workforce development system that it oversees. Our planning contractor, David Shinder, has summarized the Board priorities as follows:

- List of four top priorities expressed by board members, highlighting:
  - The primary focus of each priority
  - Additional information and input needed
  - Related priorities identified by the board.
- List of other and subsidiary priorities identified by the board, which are grouped under seven headings.

Mr. Shinder is joining today's meeting by teleconference to discuss the priorities outlined in the following attachments, secure your initial feedback, and describe next steps in articulating the board's strategic priorities.



## Oakland Workforce Development Board

### Top Priorities Identified at Strategy Discussion on June 28, 2024

<b>Improved coordination, collaboration, and alignment with other systems and programs</b>
<b><i>Focus</i></b> <ul style="list-style-type: none"><li>▪ Increase customer access to services.</li><li>▪ Improve awareness and recognition of OWDB programs.</li><li>▪ Expand resources available to customers.</li><li>▪ Add to customers' perceived and actual value of OWDB programs and services.</li><li>▪ Strengthen the impact of programs for job seeker and business customers.</li></ul>
<b><i>Additional Information Needed</i></b> <ul style="list-style-type: none"><li>• Identify partnerships/collaboration offering the greatest opportunities.</li><li>• Determine where collaboration is most accessible.</li><li>• Target specific improvements sought through collaboration with other systems/programs.</li></ul>
<b><i>Related Priorities</i></b> <ul style="list-style-type: none"><li>✓ Funding agility</li><li>✓ Business engagement</li><li>✓ Service delivery</li><li>✓ Communications</li><li>✓ Target groups</li><li>✓ Sector strategies</li></ul>

<b>Funding agility through a diversified base of resources</b>
<b><i>Focus</i></b> <ul style="list-style-type: none"><li>▪ Increase service capacity.</li><li>▪ Provide a broader range of services.</li><li>▪ Saturate target communities with resources.</li><li>▪ Strengthen partnerships through securing joint funding.</li></ul>
<b><i>Additional Information Needed</i></b> <ul style="list-style-type: none"><li>• Examine best strategies to secure diversified funding from public/private sources.</li><li>• Determine how OWDB can best leverage partner/stakeholder funding.</li><li>• Prioritize projects, initiatives, and services for which funding will be used.</li></ul>
<b><i>Related Priorities</i></b> <ul style="list-style-type: none"><li>✓ Improved coordination, collaboration, and alignment</li><li>✓ Diversity, equity, and inclusion</li><li>✓ Service delivery</li><li>✓ Target groups</li><li>✓ Sector strategies</li></ul>

<b>Improved engagement and relationships with businesses</b>
<p><b>Focus</b></p> <ul style="list-style-type: none"> <li>▪ Become local businesses' first choice for sourcing talent.</li> <li>▪ Prioritize businesses within key sectors of the local economy.</li> <li>▪ Develop strategies to support new and growing Oakland businesses.</li> <li>▪ Provide services customized to meet businesses' rapidly evolving needs.</li> </ul>
<p><b>Additional Information Needed</b></p> <ul style="list-style-type: none"> <li>• What is OWDB's unique value proposition for business?</li> <li>• How can OWDB best align with other City of Oakland business initiatives?</li> <li>• How should business engagement roles be defined? OWDB? Contractors?</li> </ul>
<p><b>Related Priorities</b></p> <ul style="list-style-type: none"> <li>✓ Improved coordination, collaboration, and alignment</li> <li>✓ Economic Security</li> <li>✓ Service Delivery</li> <li>✓ Communications</li> <li>✓ Sector strategies</li> </ul>
<b>Establishment of a "high integrity" data set for the WDB/make data-informed decisions</b>
<p><b>Focus</b></p> <ul style="list-style-type: none"> <li>▪ Utilize trusted data to inform OWDB decisions.</li> <li>▪ Source reliable data.</li> <li>▪ Implement processes that incorporate data review and analysis.</li> </ul>
<p><b>Additional Information Needed</b></p> <ul style="list-style-type: none"> <li>• Define desired data elements.</li> <li>• Establish "high integrity" parameters.</li> <li>• Identify readily accessible data.</li> <li>• Seek opportunities to secure additional high integrity data.</li> </ul>
<p><b>Related Priorities</b></p> <ul style="list-style-type: none"> <li>✓ Board development</li> <li>✓ Service delivery</li> </ul>

## Oakland Workforce Development Board

### Other and Subsidiary Priorities Identified at Discussion on June 28, 2024

#### Diversity, Equity, and Inclusion

- Target priority zip codes
- Correlate workforce development goals to 2018 Equity Indicators Report
- Job equity/parity

#### Economic Security

- Economic opportunity
- Economic stability
- Define “quality jobs”
  - ✓ Advancement potential
  - ✓ Benefits
  - ✓ Thriving wages
  - ✓ Pathways to the middle class
- Support individuals and families in their transition from reliance on TANF
- Forecast future labor market needs

#### Board Development

- WDB’s improved understanding of program operations
  - ✓ Allocation of funds
  - ✓ Program outcomes

#### Service Delivery

- Earlier career exposure and access
  - ✓ Start with elementary school students
  - ✓ Proactive approach to preparing young individuals for jobs and careers
- Ensure a “jobs first” approach to service planning and delivery

#### Communications

- Improve broadcasting of workforce development opportunities
- Conduct targeted marketing

#### Target Groups

- Focus on priority populations
  - ✓ Single parents/female single heads of household
  - ✓ Disconnected youth
  - ✓ Foster youth
  - ✓ Justice-involved individuals
  - ✓ Older workers
  - ✓ English language learners
- Utilize focus groups to engage with priority populations

### **Sector Strategies**

- Focus on priority sectors
  - Healthcare
  - Construction
  - IT/Professional Technical Services
  - Clean Energy/Climate Resilient Jobs
  - Utilities
  - Social Services/Non-Profit Administration
  - Public Sector
  - Creative Economy



### ITEM III.b.i – INFORMATIONAL

**To: Oakland Workforce Development Board**  
**From: OWDB Staff**  
**Date: November 7, 2024**  
**Re: 2023-2024 WIOA Program Summary Final Report**  
**2023-2024 Local Area Performance**  
**2023-2024 Service Provider Performance**

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#### **2023-2024 WIOA PROGRAM SUMMARY FINAL REPORT**

Workforce Innovation and Opportunity Act (WIOA) establishes core performance measures for Adult, Dislocated Worker & Youth programs. WIOA performance measures are designed to measure the effectiveness and continuous improvement of the workforce service delivery system, and the contracting agency will be required to collect and report data through CalJOBS pertaining to these measures. Performance measures are subject to change at any time, and the OWDB may set performance benchmarks or implement additional measures in response to regulations or local need. The California Workforce Development Board (CWDB) requires that each local area meet at minimum 90% of their goals.

The summary below provides the final overview of the total number of enrollments, exits and outcomes in Fiscal Year 2023-2024 for WIOA Adult, Dislocated Worker and Youth participants.

#### **HIGHLIGHTS:**

- 603 New participants served (an increase of 65% from PY 22-23)
- 76% of total participants were enrolled into Training, Education & Work Experience
- 39% of those who exited achieved outcomes in employment placement, training placement or training certificate/credential attainment
- Average hourly wage: \$24.14

**TABLE 1- PARTICIPANT SUMMARY****HIGHLIGHTS:**

- 74% of participants exited within PY 23-24
- 38% of placements are Oakland-based employers

<b>I.</b>	<b>Participation Summary</b>	<b>Enrolled</b>	<b>Exited</b>
<b>A.</b>	<b>Total Participants</b>	<b>821</b>	<b>609</b>
	Participants Carried In	218	197
	New Participants	603	412
<b>B.</b>	<b>Eligible Youth 5% Exception</b>		
	Youth 5% Exception	3	3
<b>C.</b>	<b>In School / Out Of School Youth (Funding Definition)</b>		
	In School Youth	61	32
	Out Of School Youth	154	123
<b>D.</b>	<b>Program Exit Information</b>		
	Entered Unsubsidized Employment		130
	Training Related Employment		15
	Entered Military Service		1
	Entered Qualified Apprenticeship		2
	Entered Post-Secondary Education		21
	Entered Advanced Training		1
	Individuals Attained Recognized Certificate/Diploma/Degree		59
	Individuals Attained High School Diploma/GED		9
	Returned to Secondary School		0
	Exits Excluded from Performance		5
	Other Exits		454

**HIGHLIGHTS:**

- Highest enrollments are Black, Latino & Asian
- Greatest barriers to employment: basic skills deficient & English language learner

**TABLE 2 - PARTICIPANT CHARACTERISTICS**

II.	Participation Characteristics Summary	Enrolled	Exited
<b>A.</b>	<b>Gender</b>		
	Female	444	330
	Male	372	274
	Did not self-identify	5	5
<b>B.</b>	<b>Age</b>		
	14 - 18	130	89
	19 - 21	84	57
	22 - 24	69	47
	25 - 34	165	137
	35 - 44	178	134
	45 - 54	114	86
	55 - 64	56	37
	65 and older	25	22
<b>C.</b>	<b>Race/Ethnicity</b>		
	Ethnicity Hispanic or Latino	209	153
	American Indian / Alaskan Native	21	17
	Asian	148	104
	African American / Black	356	274
	Hawaiian Native / Other Pacific Islander	14	9
	White	99	79
	Other	0	0
<b>D.</b>	<b>Veteran Status</b>		
	<b>Total Veterans</b>	<b>25</b>	<b>23</b>
	Served Less than 181 Days	0	0
	Eligible Veteran	25	23
	Other Eligible Person	0	0
	Campaign Veteran	10	10
	Disabled Veteran	2	2
	Special Disabled Veteran	4	3
	Recently Separated Veteran	5	4
	Transitioning Service Member	1	1
<b>E.</b>	<b>Labor Force Status</b>		
	Employed	111	80
	Employed, but received notice of layoff or termination	1	1
	Unemployed	709	528
<b>F.</b>	<b>School Status at Participation</b>		
	In School, High School or Less	63	33
	In School, Alternative School	9	8
	In School Attending Post High School	43	30

	Out-of-School, High School Dropout	104	79
	Out-of-School, High School Grad	589	447
	Not Attending School, Within Age of Compulsory School Attendance	13	12
<b>G.</b>	<b>Unemployment Insurance Status</b>		
	Eligible Claimant, Referred by WPRS	2	2
	Eligible Claimant, referred by REA/RESEA	2	2
	Eligible Claimant, not referred by WPRS/RESEA	109	76
	Exhaustee	28	19
<b>H.</b>	<b>Barriers</b>		
	Disabled	40	31
	English Language Learner	182	120
	Single Parent (including single pregnant women)	32	26
	Displaced Homemaker	17	15
	Offenders	32	28
	Homeless	73	60
	Runaway Youth	0	0
	Pregnant / Parenting Youth	3	1
	Youth Requires Additional Assistance	95	81
	Youth Serious Barriers to Employment (WIA legacy)	0	0
	Basic Literacy Skills Deficient	307	228
	Youth in, or aged out of, Foster Care	4	3
	Out of Home Placement	0	0
	Eligible under Section 477 of the Social Security Act	0	0
	American Indian/Alaskan Native	0	0
	Hawaiian Native	0	0
	Within 2 years of exhausting TANF lifetime eligibility	4	4
	Facing Substantial Cultural Barriers	26	23
	Eligible Migrant Seasonal Farmworkers as defined in WIOA Sec 167 (i)	1	0
	Meets Governor's special barriers to employment	8	7
<b>I.</b>	<b>Income / Public Assistance</b>		
	Low Income	683	521
	TANF	31	22
	SSI	8	7
	Receiving Social Security Disability Insurance Income (SSDI)	5	4
	State or Local Income-Based Public Assistance (General Assistance)	40	31
	Refugee Cash Assistance (WIA Legacy)	0	0
	Supplemental Nutrition Assistance Program (SNAP)	293	218
	Foster Child (State or Local Payments are Made)	15	13
	Youth living in the High-poverty Area	30	28
	Youth Receives or is Eligible to Receive Free or Reduced Lunch	53	24



**HIGHLIGHTS:**

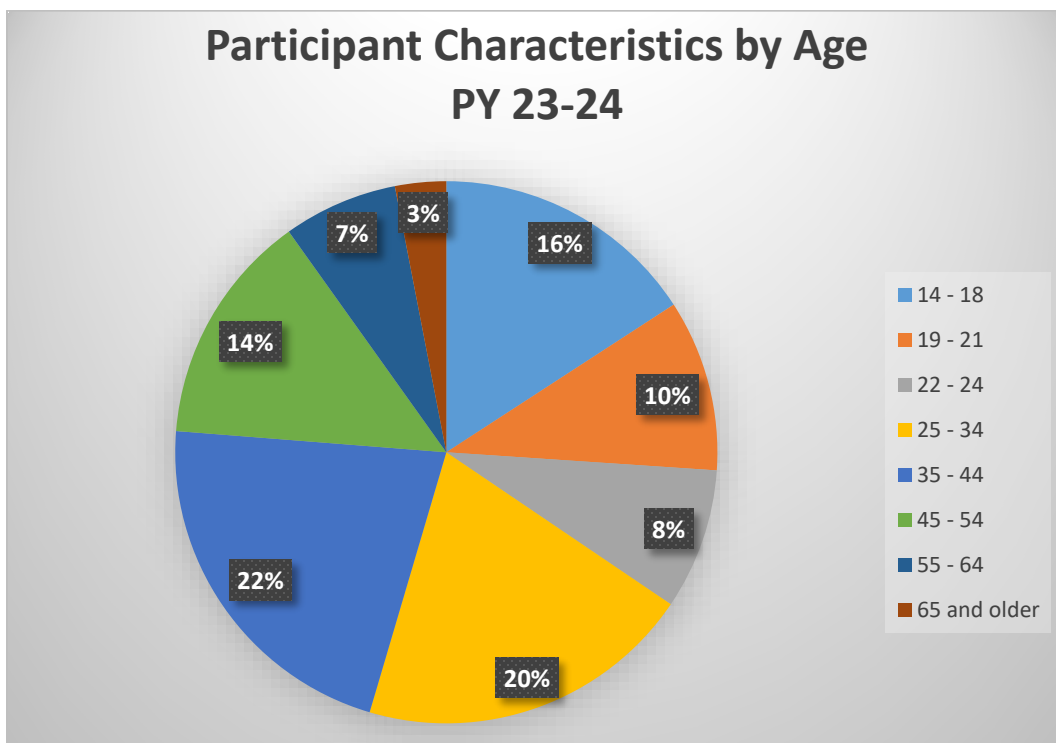
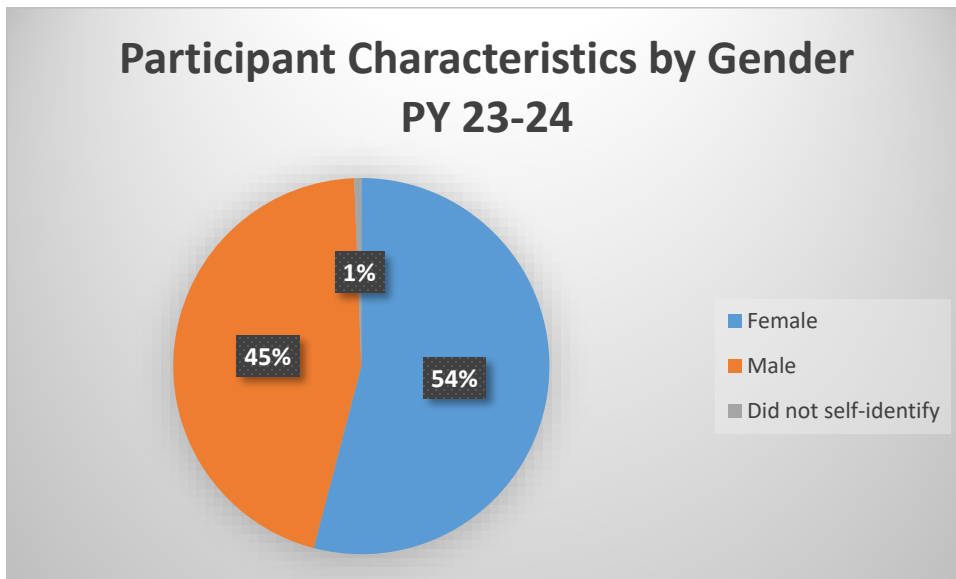
- 39% increase of participants enrolled into Training Services
- 46% increase in supportive services

**TABLE 3 - SERVICES SUMMARY****ENROLLED****EXITED**

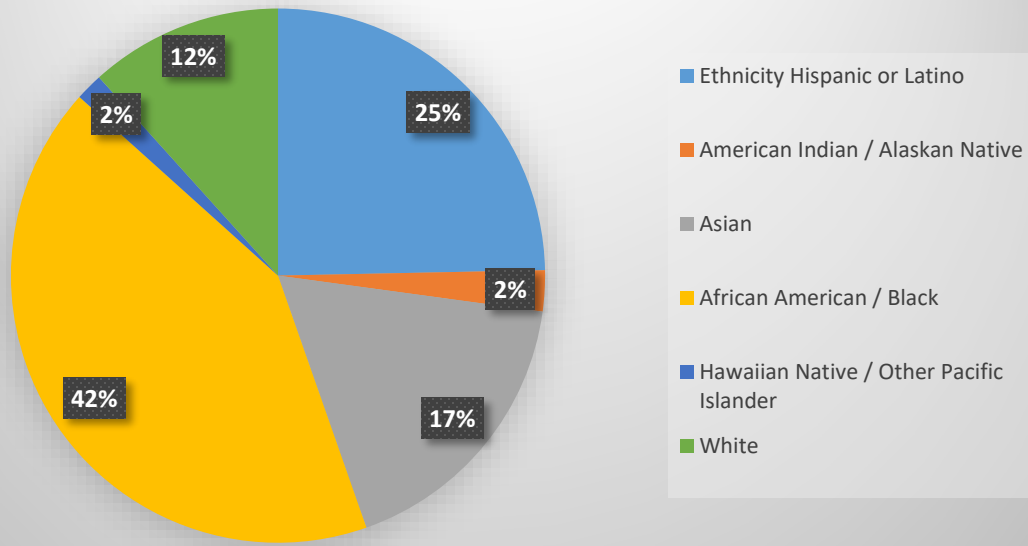
<b>I.</b>	<b>Participation Summary</b>	<b>Enrolled</b>	<b>Exited</b>
<b>A.</b>	<b>Total Participants</b>	<b>821</b>	<b>609</b>
<b>B.</b>	<b>Program Activities / Services Summary</b>		
	Basic Career Services (Staff-Assisted)	766	584
	Information Only/Workforce Information	17	10
	Referred to VA Services	0	0
	Referred to Other Federal/State Assistance	4	2
	Individualized Career Services	775	573
	Financial Literacy	166	119
	English as Second Language Services	52	43
	Pre-Vocational Activities	3	3
	<b>Work Experience</b>	<b>209</b>	<b>151</b>
	Summer Employment/Internship during the Summer (WIOA Youth)	139	114
	Employment opportunities, including internships, not limited to summer months	58	31
	Pre-apprenticeship programs	12	6
	Job shadowing	0	0
	On-the-Job Training (WIOA Youth)	1	1
	Transitional Job (WIOA Adult, Dislocated Worker, and Dislocated Worker Grants)	0	0
	Other work experience activities	58	31
	<b>Training Services</b>	<b>196</b>	<b>127</b>
	Occupational Skills Training	154	92
	Customized Training	0	0
	Skills Upgrade Training	0	0
	Entrepreneurial Training	0	0
	Registered Apprenticeship Training	4	2
	ABE / ESL with Occupational Skills Training	0	0
	ABE / ESL NOT in Conjunction with Training	0	0
	On the Job Training	15	13
	Pre-Requisite Training	0	0
	Youth Occupational Skills Training	19	14
	Other Non-Occupational Skills Training	7	7
	Job Readiness Training in Conjunction with Other Training	9	9
	<b>Youth Services</b>	<b>215</b>	<b>155</b>
	Secondary Education	18	11
	Alternative Secondary Education	5	4
	Educational Achievement Services	39	31
	Education Offered Concurrently with Workforce Preparation	1	1
	Leadership Development	6	3
	Adult Mentoring Services	0	0
	Comprehensive Guidance/Counseling Services	32	30
	Labor Market and Employment Information	183	142

	Postsecondary Transition and Preparatory Activities	0	0
	Established Individual Training Account (ITA)	134	78
	Support Services	212	164
	Needs - Related Payments	1	1
<b>II.</b>	<b>Co-Enrollment Summary</b>	<b>Enrolled</b>	<b>Exited</b>
	Multiple WIOA Funding	77	64
	Wagner Peyser	20	16
	Generic Programs	2	2

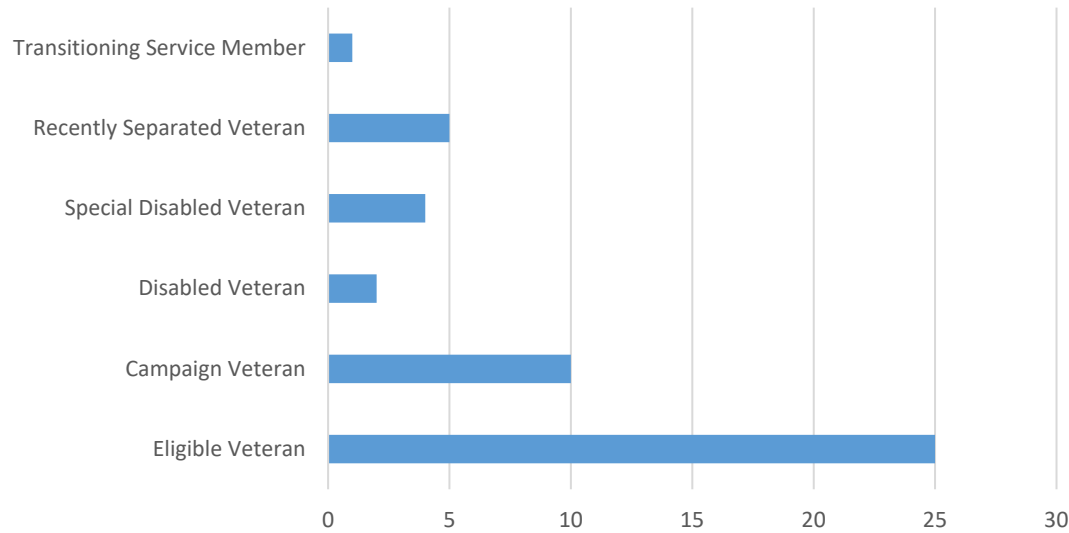
**Table 2 Participant Summary Reference Charts**



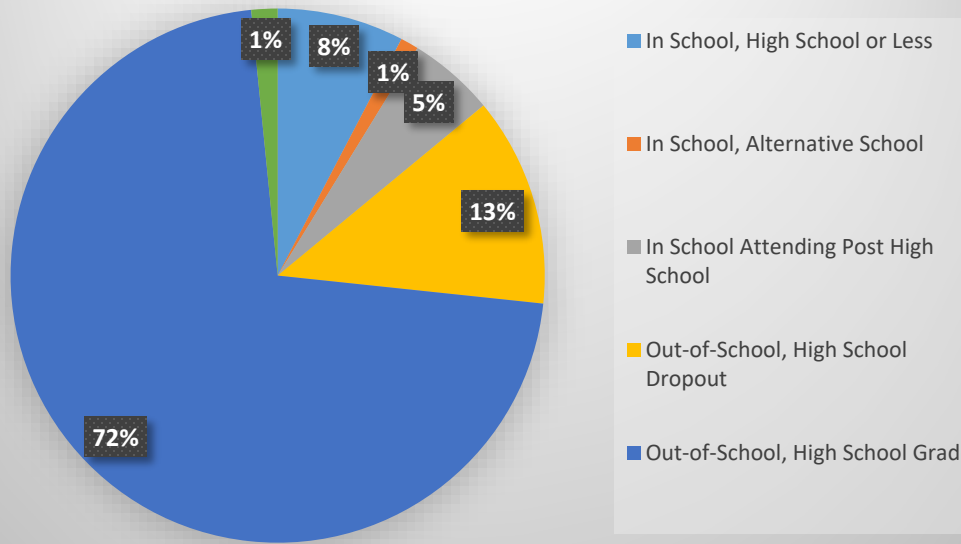
## Participant Characteristics by Race PY 23-24



## Participant Characteristics by Veteran Status PY 23-24



## Participation by School Status PY 23-24



### 2023-2024 LOCAL AREA PERFORMANCE

The Workforce Innovation and Opportunity Act (WIOA) Section 116(c) requires the state to reach an agreement with the Local Workforce Development Boards (LWDBs) on local-level performance goals for the WIOA Title IB Adult, Dislocated Worker, and Youth programs.

Per State Level Performance Goals and Local Area Negotiations ([WSD19-11](#)) LWDBs negotiate with the state and reach an agreement on local levels of performance. Negotiations take place every two years, and are negotiated two Program Years (PY) at a time. Once negotiations are completed, the goals are final and second year goals cannot be renegotiated.

In September 2022, the state negotiated the attached performance goals with OWDB for PYs 22 and 23 (PY 22-23 & PY 23-24).

PY 22-23 & PY 23-24 Performance Measures (Goals & Actuals)	ADULT		DW		YOUTH	
	Goal	Actual	Goal	Actual	Goal	Actual
Employment Rate 2nd Quarter After Exit	63.00%	67.20%	70.00%	63.90%	73.00%	62.60%
Employment Rate 4th Quarter After Exit	56.40%	64.10%	66.50%	64.20%	70.00%	68.80%
Median Earnings 2nd Quarter After Exit	\$8,000	\$8,341	\$ 9,900	\$11,138	\$ 4,000	\$5,310
Credential Attainment 4th Quarter After Exit	65.50%	66.20%	73.40%	77.40%	51.10%	64.70%
Measurable Skill Gains	50.90%	14.60%	52.60%	25.00%	63.00%	76.60%

In September 2024, the state negotiated the attached performance goals with OWDB for PYs 24 and 25 (PY 24-25 & PY 25-26):

<b>PY 24-25 &amp; PY 25-26 Performance Measures</b>	<b>ADULT</b>	<b>DW</b>	<b>YOUTH</b>
<b>Employment Rate 2nd Quarter After Exit</b>	65.0%	66.5%	72.0%
<b>Employment Rate 4th Quarter After Exit</b>	62.0%	65.0%	65.2%
<b>Median Earnings 2nd Quarter After Exit</b>	\$8,500	\$ 10,400	\$ 4,418
<b>Credential Attainment 4th Quarter After Exit</b>	57.2%	65.0%	54.0%
<b>Measurable Skill Gains</b>	50.0%	50.0%	61.0%

## **PRIMARY INDICATORS OF PERFORMANCE DEFINITIONS:**

### **Employment Rate – 2nd/4th Quarter After Exit**

The percentage of participants who are in unsubsidized employment during the second/fourth quarter after exit from all programs.

For Youth Participants, the indicator is the percentage of participants in education or training activities, or in unsubsidized employment during the second/fourth quarter after exit.

### **Median Earnings**

The median earnings of participants who are in unsubsidized employment during the second quarter after exit from all programs. A median calculation involves sorting the values in increasing order and picking the middle value. This value is the median.

### **Credential Attainment**

The percentage of those participants enrolled in education or training (excluding those in On-the-Job Training [OJT] and customized training) who attain one of the following during participation or within one year after exit:

- a recognized postsecondary credential
- a secondary school diploma or its recognized equivalent or certificate

A participant who has attained a secondary school diploma or its recognized equivalent is counted as a positive outcome only if the participant also meets one of the following criteria during participation or within one year after exit:

- employed
- enrolled in an education or training program leading to a recognized postsecondary credential

### **Measurable Skill Gains**

The percentage of program participants who, during a program year, are enrolled in education or training that leads to a recognized postsecondary credential or employment AND have also achieved one or more measurable skill gains. A measurable skill gain is defined as documented

academic, technical, occupational, or other forms of progress that lead to a credential or employment. Depending on the type of education or training program, progress must be documented using one of the following:

- Achievement of at least one educational functioning level of a participant who is receiving instruction below the postsecondary education level
- Attainment of a secondary school diploma or its recognized equivalent
- Secondary or postsecondary transcript or report card for a sufficient number of credit hours that shows a participant is meeting academic standards
- Satisfactory or better progress report, towards established milestones, such as completion of OJT or completion of one year of an apprenticeship program or similar milestones, from an employer or training provider who is providing training
- Successful passage of an exam that is required for an occupation or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams

### **2023-2024 WIOA SERVICE PROVIDER PERFORMANCE**

The City and the Oakland Workforce Development Board (OWDB) contracts with nine (9) organizations to provide workforce development services to Oakland. The overall goals of these workforce organizations are to help Oakland residents develop the skills to attain the knowledge, and access the resources needed to thrive in a career; and provide employers with the skilled workers needed to sustain and competitively grow their businesses.

The OWDB's Workforce Innovation and Opportunity Act (WIOA) Title I Services provided throughout the city include the following programs:

- Adult Program - Serves individuals 18 and older by providing them with job search assistance and training opportunities and to help meet employer workforce needs. Service Providers must give priority to recipients of public assistance, other low-income individuals, individuals who are basic skills deficient, veterans and their eligible spouses.
- Dislocated Worker Program - Designed to help workers get back to work as quickly as possible and overcome barriers to employment. When individuals become dislocated workers because of job loss, mass layoffs, global trade dynamics, or transitions in economic sectors, the Dislocated Worker program provides services to assist them in re-entering the workforce.
- Youth Program - Comprehensive youth employment program for serving eligible youth, ages 16-24, who face barriers to education, training, and employment.

Guided by the Race and Equity Indicators, the City prioritizes workforce services to Black, Indigenous, and people of color (BIPOC) residents residing in the areas of East, West and Central Oakland. This report is incorporated as a primary local area workforce development board (LWDB) guide when determining local policies.

## **WIOA Service Provider Enrollments Report: Analysis**

Each Service Provider (SP) proposed and negotiated enrollment goals with OWDB for FY 2023-2024. The report attached reflects the updated enrollments within FY 2023-24 (July 1, 2023 – June 30, 2024) for the following:

1. Enrollment Goals for each WIOA program
2. Current number of enrollments
3. Percentage of each enrollment goal

These numbers were generated by reports within CalJOBS and are being cross-referenced with service provider reported data. Staff identified reporting discrepancies which both OWDB Staff and SP staff are working together to fix in CalJOBS.

## **WIOA Local Area Employment Placements**

Within FY 2023-24, a total of 130 participants obtained employment, averaging \$24.14 in wages, and within the following industries:

- \*Healthcare (18%)
- Professional, Scientific & Technical Services (17%)
- \*Manufacturing (10%)
- \*Transportation, Warehousing & Logistics (10%)
- Education (8%)
- Other Services (7%)
- Government/Public Service (5%)
- Administrative & Support Services (5%)
- Retail (4%)
- \*Hospitality & Food Services (4%)
- \*Construction (4%)
- Information & Technology (2%)
- Arts, Entertainment & Recreation (2%)

### **Highlights:**

- 37% of placements are Oakland-based employers
- \*47% of placements are in OWDB's priority industry sectors



### ITEM. III b.ii. - INFORMATIONAL

**To: Oakland Workforce Development Board**  
**From: OWDB Staff**  
**Date: November 7, 2024**  
**Re: Summer Youth Employment Program (SYEP) 2024 Report**

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#### **BACKGROUND**

The City of Oakland, along with partners from the public, private, and nonprofit sectors, has had a longstanding commitment to providing summer jobs and other work-based learning opportunities for Oakland youth for more than four decades. The cornerstone of this effort focuses on investing in the Oakland Summer Youth Employment Program, which provides funds to subsidize paid jobs and work experience opportunities sponsored through local nonprofit organizations. The level of direct investment in this program varies from year to year, while the funding to support it has historically come from various public, private, and philanthropic sources.

The City of Oakland's Summer Youth Employment Program (SYEP) prioritizes services for youth from historically disadvantaged communities, including Black, Latinx, Native American, and Pacific Islander opportunity youth not connected to the traditional school system. Services focus on youth who are not working, have little to no work experience, are aged 16-21, and reside in East Oakland, Fruitvale, and West Oakland. The SYEP provides Oakland youth with opportunities to earn money, gain meaningful work experience and improve their job-readiness skills. The City contracts with local youth-serving organizations for the following:

- Recruit and enroll youth in the program
- Provide youth with high-quality job-readiness training
- Identify organizations to serve as work sites for youth
- Act as the employer-of-record/fiscal sponsor for youth whose wages are subsidized through the program

OWDB partnered with Oakland Fund for Children and Youth (OFCY) on the 2022-2025 Request for Proposals (RFP) through the Career Access and Employment for Youth In-School: Summer Jobs – Transition to Adulthood funding strategy that was released January 10, 2022. Proposals were reviewed by OFCY staff, an outside group of readers and reviewers, OFCY Planning and Oversight Ad-Hoc Review Subcommittee, as well as OWDB staff. Funding recommendations are made with consideration to location of services, service to priority populations, strategic alignment, past performance, and reasonableness and feasibility of budget and activities. Lao Family Community Development, Inc., Youth Employment Partnership, and Trybe Inc. were recommended for the OWDB Summer Youth Employment Program. The OWDB approved funding recommendations on the May 5, 2022 meeting.

OWDB staff is finalizing final performance results and will be presented during the meeting.





ITEM III.c - Informational

## MEMORANDUM

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<b>TO:</b>	Oakland Workforce Development Board	<b>FROM:</b>	Kat Torio, Economic and Workforce Development Department
<b>SUBJECT:</b>	Draft Film Rebate Program Regulations	<b>DATE:</b>	November 1, 2024

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On July 16, 2024 the Oakland City Council adopted [Ordinance No. 13808 C.M.S.](#), which established a Film Rebate Program for film productions in the City of Oakland (City). The Film Rebate Program is codified in Section 5.24.190 of the Oakland Municipal Code (O.M.C.). The purpose of the Film Rebate Program is to increase the number of film productions occurring within the City to generate local employment and business opportunities, attract new tax revenues to support City services, and provide outlets for artistic expression. Furthermore, [Ordinance No. 13808 C.M.S.](#) authorized the City Administrator to develop regulations outlining the application process and how to qualify for a rebate (See O.M.C. § 5.24.190.G.).

Accordingly, staff has authored the attached draft Film Rebate Program Regulations. Prior to finalizing the regulations, staff is presenting the regulations to the Cultural Affairs Commission and the Oakland Workforce Development Board for public review and comment. After receiving public feedback, staff intends on finalizing the regulations and initiating the Film Rebate Program this fall.

Respectfully submitted,

---

KAT TORIO  
Special Event and Film Office Coordinator  
Economic and Workforce  
Development Department

ATTACHMENT A: Draft Film Rebate Program Regulations

## CITY OF OAKLAND

### FILM REBATE PROGRAM REGULATIONS

Draft for Consideration by the Cultural Affairs Commission

#### I. Introduction

On July 16, 2024 the Oakland City Council adopted [Ordinance No. 13808 C.M.S.](#), which established a Film Rebate Program for film productions in the City of Oakland (City). The Film Rebate Program is codified in Section 5.24.190 of the Oakland Municipal Code (O.M.C.). The purpose of the Film Rebate Program is to increase the number of film productions occurring within the City to generate local employment and business opportunities, attract new tax revenues to support City services, and provide outlets for artistic expression. Furthermore, [Ordinance No. 13808 C.M.S.](#) authorized the City Administrator to develop regulations outlining the application process and how to qualify for a rebate (See O.M.C. § 5.24.190.G.). Accordingly, below please find the City’s Film Rebate Program Regulations. Please note that the definitions provided in the Film Permitting Ordinance, [Oakland Municipal Code 5.24](#), apply to the below regulations.

#### II. Definitions

- a. “Commercial Advertising” means a Filming Activity for the purposes of dissemination of promotional messages with the primary intent to encourage the purchase, use, or endorsement of goods, services, or brands.

- b. “Expenditure” means the portion of production costs that are incurred within the City of Oakland, including wages for crew and staff who reside in the City of Oakland.
- c. “Filming Activity” has the same meaning as provided in O.M.C. Section 5.24.020 and means the staging, shooting, filming, videotaping, photographing, or other similar process conducted for the making of still photographs, motion pictures, television programs, commercial, and nontheatrical film productions.
- d. “Rebate Pre-Approval Application” means an application submitted by a person or entity who intends to conduct Filming Activity pursuant to a City of Oakland Film Permit that provides an informed estimate of expenditures and qualified expenses for the Filming Activity, which shall be used by the City of Oakland to reserve available funds for rebate purposes.
- e. “Rebate Reimbursement Request” means a form submitted by a film permittee after filming activities to the City of Oakland that provides documentation of actual expenditures and qualified expenses and requests a rebate up to but not exceeding the amount previously conditionally approved by the City in response to a Rebate Pre-Approval Application.
- f. “Waitlist” means the ordered list of film permittees who have submitted a Rebate Pre-Approval Application and are otherwise eligible for a rebate pending the availability of funds for the Film Rebate Program.

### **III. Eligibility Criteria**

The City of Oakland Film Rebate Program provides a rebate of eligible expenses for qualified film activities and productions thereof filmed in Oakland by qualified applicants who complete a Rebate Pre-Approval Application and subsequently submit a Rebate Reimbursement Request.

#### **a. Who Qualifies for a Film Rebate**

*O.M.C. § 5.24.190.C.*

- i. Only applicants who will obtain a film permit for Filming Activity in the City (herein “film permittees”) are eligible for a rebate under the Film Rebate program. As described in Section V, Rebate Application Process, an applicant shall apply for rebate pre-approval ahead of receiving their film permit.
- ii. In order to receive a rebate, film permittees must provide film skills and training to Oakland residents. The film skills and training shall comply with the standards outlined in the City of Oakland’s Film Rebate Skills and Training Guidelines.

#### **b. What Filming Activities Qualify for a Film Rebate**

*O.M.C. § 5.24.190.C.*

- i. A Filming Activity and production thereof must have a minimum aggregate expenditure of \$250,000 to be eligible for a rebate under the Film Rebate Program. All filming activities which receive a film permit

qualify, regardless of production type or content, so long as the minimum aggregate expenditure is met.

- ii. Notwithstanding the above, each fiscal year the City Administrator is authorized to make no less than ten percent of Film Rebate Program funds available to filming activities and production thereof for purposes other than commercial advertising with a minimum aggregate expenditure of at least \$50,000 and not more than \$250,000.
  1. Eligible filming activities and production thereof include the following categories: Feature, Series, Television, Music Video, Short Subject, Still Photography, Student Projects, and Public Service Announcements.
  2. Through these regulations, the City Administrator establishes that the funds available for these smaller aggregate expenditure filming activities shall be set at ten percent of the Film Rebate Program funds available each fiscal year. If a higher percentage is to be utilized for smaller aggregate expenditure filming activities, it shall be stated within these regulations.

**c. What Expenses Qualify for a Film Rebate**

*O.M.C. § 5.24.190.D.*

The following expenses are eligible for rebates in the amounts described in Section IV below. The City of Oakland has sole discretion in determining whether

a budgeted expense identified in a Rebate Pre-Approval Application qualifies under the categories below.

- i. Any item or service purchased or rented from a business located within the City for purposes of use toward the Filming Activity, including pre- or post-production, and including but not limited to the following:
  1. Hotel bills (short term residential rentals, those that have lengths of stay of less than 30 days, are not eligible as they are not permissible within the City of Oakland).
  2. Facility rentals, studio rentals, and auxiliary location costs.
  3. Catering services.
  4. Equipment rentals.
  5. Production operation costs such as safety, construction, and wardrobe.
  6. Post production costs directly pertaining to editorial, post-production lab and facilities, post-production sound, music, visual effects, and color grade and finishing, but not including post production travel expenses.
- ii. The hourly pay (wages) or salaries of City residents employed or contracted by the film permittee, or a subcontractor of the film permittee, performing work for the Filming Activity or post-production. Eligible wages and salaries are based on the Oakland residency of the worker, not on the location of the employer.

iii. The following expenses are not eligible for rebate:

1. City of Oakland permitting fees, including film permitting, parking reservation fees, and costs for city personnel services and reimbursements.
2. City of Oakland business taxes.

**IV. Rebate Amounts**

*O.M.C. § 5.24.190.E.*

a. Film permittees meeting the eligibility criteria described above in Section III. are eligible to receive rebates in the following amounts:

- i. A ten percent (10%) rebate on all eligible expenses as identified in the Rebate Pre-Approval Application; and
- ii. An additional two and a half percent (2.5%) rebate on those identified eligible expenses which are hourly pay or salaries of Oakland residents whose principal residence is located within the [Oakland zip codes](#) 94621, 94603, 94605, 94601, or 94607.
- iii. An additional two and a half percent (2.5%) rebate on those identified eligible expenses which are items or services purchased from businesses located in [Oakland zip codes](#) 94621, 94603, 94605, 94601, or 94607.
- iv. An additional two and a half percent (2.5%) rebate on expenses which are items or services purchased from worker-owned cooperative businesses.

1. To qualify as a worker-owned cooperative, a business must consist of a corporation, formed under California Corporations Code Title 1, Division 3, Part 2 and be organized and operated by the persons who perform the labor for that enterprise. Consistent with California Corporations Code Section 12253.5, at least 51 percent of the workers shall be worker-members or candidates. To qualify, a worker-owned cooperative business must be currently registered with the California Secretary of State as a General Cooperative entity type.

**V. Rebate Application Process**

*O.M.C. § 5.24.190.G.*

- a. The City will process Rebate Pre-Approval Applications from qualifying film permittees with anticipated eligible expenses on a rolling basis until funds are no longer available. The City will process Rebate Reimbursement Requests consistent with those Rebate Pre-Approval Applications and will verify that the film permittees actual expenditures meet the minimum requirements identified in Section III.B.
  - i. The City will reserve ten percent of the total amount of film rebate program funds available on an annual basis exclusively available to non-commercial advertising film permittees with expenditures of between fifty thousand dollars (\$50,000) and two-hundred and fifty thousand dollars (\$250,000).



- b. Each film permittee may only submit one Rebate Pre-Approval Application per production.
- c. Permittees must submit a Rebate Pre-Approval Application, receive an approval from the City as described below, and subsequently submit a Rebate Reimbursement Request in accordance with the timing provided below in order to receive a rebate. Where a film permittee who received conditional approval of their Rebate Pre-Approval Application fails to timely submit a Rebate Reimbursement Request, the funds conditionally committed to that film permittee shall be released and made available to film permittees on the Waitlist. In such circumstances, the film permittee may request and if requested the City shall place the film permittee at the end of the Waitlist.
- d. City staff will review Rebate Pre-Approval Applications and notify film permittees whether their application is incomplete or conditionally approved and for what rebate amount. The conditionally approved amount shall be based on the 10% baseline of eligible expenditures as well as the additional 2.5% bonuses based on the reasonable estimates and documentation provided by the film permittee.
  - i. The Rebate Pre-Approval Application shall be made on the form provided by the City and the expenditures shall be supported by reasonable estimates of time, location, and costs, with a level of documentation as reasonable based on how soon the filming is scheduled to occur. Whether the costs are reasonable estimates shall be solely at the discretion of the City, and the City reserves the right to request further

information on how the film permittee calculated the estimated expenditures.

- ii. If the film permittee is seeking rebates beyond the 10% baseline of eligible expenditures, the reasonable estimates shall specify the amounts that are eligible for those additional rebates.
  - iii. If all available rebate funding has been committed for Rebate Pre-Approval Applications already submitted, the City will place subsequent conditionally approved Rebate Pre-Approval Applications on a rebate Waitlist and the City will inform the film permittee of their waitlist position.
- e. Once conditionally approved, film permittees must apply for and obtain a City film permit, and must commence Filming Activity within one-hundred and eighty (180) days after the City approves the Rebate Pre-Approval Application.
- i. Concurrent with submitting the film permit application, the film permittee shall provide all available documentation, such as any contracts and invoices received to date, that supports the estimates and shall revise downward the expenditures if appropriate based on documentation. The total expenditures must continue to exceed the qualifying expenditure threshold identified in Section III.B in order to remain eligible. No rebates will be issued to film permittees who cannot substantiate meeting the qualifying expenditure threshold.

- ii. A film permittee may receive one thirty (30) day extension if they submit an extension application prior to the end of the one-hundred and eighty (180) day period that provides one of the following justifications:
  - 1. Force majeure events (e.g. a pandemic, natural disaster, etc.); or
  - 2. Unforeseen production delays (e.g. equipment failure, industry strikes); or
  - 3. Administrative or legal complication (e.g. permit delays, contract dispute); or
  - 4. Financial challenges (e.g. funding delays).
- f. Within one hundred and eighty (180) days from the last day of Filming Activity as stated in the film permit, film permittees must submit a Rebate Reimbursement Request to the City.
  - i. In order to receive a rebate, film permittees must submit a complete Rebate Reimbursement Request, including but not limited to the following:
    - 1. Receipts and proof of payment documenting expenses by categories requested;
    - 2. Residency and demographic information of Oakland residents hired;
    - 3. Proof of meeting skills and training requirement.
  - ii. Oakland Residency shall be established through a minimum of two of the following current records evidencing one year of current residency:

1. California driver's record;
  2. California identification card record;
  3. Property tax billing and payments from the current or previous year;
  4. Verified copies of state or federal income tax returns from the current or previous year where an Oakland address is listed as a primary address;
  5. School, medical, or banking records from the current year and including both the Oakland resident's name and address;
  6. Utility, cable, or internet company billing records from the current year and including both the Oakland resident's name and address.
- iii. If the requirements above are not met, including if the film permittee did not have expenditures exceeding the qualifying expenditure threshold identified in Section III.B, then no rebate will be issued.
- iv. The City shall not issue a rebate that exceeds the amount stated in the Rebate Pre-Approval Application. Notwithstanding the above, where a request for a rebate on qualifying expenditures exceeds the amount stated in the Rebate Pre-Approval Application, the request for the portion of the rebate up to the amount stated in the Rebate Pre-Approval Application will be processed in accordance with the process described in these regulations while the request for the portion in excess of the

amount stated in the Rebate Pre-Approval Application will be placed at the end of the Waitlist and will be processed only if funds are available.

- g. The City will issue reimbursement payments in accordance with the [City's Prompt Payment Ordinance \(O.M.C. Chapter 2.06\)](#).
- h. Film permittees who fail to submit a Rebate Reimbursement Request within one hundred and eighty (180) days of the last day of Filming Activity as stated in the film permit forfeit the rebate funds that the City pre-approved and the City will make those funds available to rebate applicants on the Waitlist.
- i. A film permittee who receives a rebate must provide the City with the following:
  - 1. Except where such credit is prohibited by the Children's Television Act or any other state or federal government policy, an onscreen credit that states, "Filmed with the support of the City of Oakland" and includes the following image:

The logo for the City of Oakland, featuring a stylized tree with a dense canopy of horizontal lines, positioned above the words "CITY OF OAKLAND" in a bold, sans-serif font.
  - 2. High-resolution publicity stills of behind the scenes; and
  - 3. Artwork or posters; and

4. Press kit, such as clips and trailers.

**VI. Program Subject to Funding Availability**

- a. The above-described Film Rebate Program is only effective if funding is available within the Film Rebate Program.

**VII. Regulations Subject to Change Over Time**

- a. The City reserves the right to make adjustments to these regulations based on information gathered from implementation.

## Film Initiative Skills & Training

At minimum the training shall consist of at least one selection from the skills and training requirement options below. Approved applicants must receive final approval with the film office on planned offerings.

### 1. Classroom Workshops & Lectures

Provide students enrolled in an OUSD high school, Oakland-based community college or one of the [approved career-based non-profit programs](#) classroom workshops, panels, or demonstrations on aspects of the film industry, conducted by entertainment industry professionals. Workshops can cover pre, principle or post aspects of production.

- If virtual, workshops must contain at least one (1) interactive component.
- All qualifying workshops and lectures must be a minimum of 1 hour

#### Session Examples

- A cinematographer provides a tour of the latest equipment used to shoot on set or in various types of locations.
- An AD or line producer could do a tutorial on their process for scheduling and creating call sheets and other production documents using industry-specific software.
- A casting director/team leads an audition workshop, including proper slate and selftape must-haves.
- An editor provides notes to students' rough cut media projects.
- Line producers break down a script during pre production.

**2. Paid PA's\*** Provide paid PA positions to one or more Oakland residents 18 years or older that are enrolled in or recently graduated from an Oakland-based community college, one of the [approved career-based non-profit programs](#), or other qualified media program. Any productions utilizing PA's in technical craft positions need to notify the applicable union representative.

\*For Productions with expenditures between \$50-\$250k unpaid shadowing opportunities may be substituted for paid positions. Shadows must:

- Be provided meals on set

Receive at least one sit down with a department mentor at the conclusion of the shadowing period; however regular check-in's throughout the production are strongly encouraged.

### 3. Faculty Externship

Provide a minimum of eight (8) hours for educators and/or faculty to observe the set operations, post-production and other specialized departments. Production companies may provide arts, media, and entertainment educators an opportunity to shadow or audit a virtual production meeting of a particular department. Pre-recorded or virtual tutorials are acceptable as long as there is a live Q&A component included.

### Session Examples

- Attend a meeting in which a script is broken down into visual effects shots.
- Participate in a planning session, for a motion capture or green screen shoot and observe the filming.
- Schedule a job shadow day with a post-production supervisor to better understand today's delivery elements for film and television.
- Observe a live stream or spotting session with a director and/or a composer to better understand the latest music technology.
- Attend a 3-D film shoot and discuss the technology with the director of photography.
- Attend a color correction session to gain up-to-date knowledge of the latest tools.
- Follow location scouting.
- Breaking down script with line producer

### 4. Professional Skills Tour

Provide to students, enrolled in an OUSD high school, Oakland-based community college or one of the [approved career-based non-profit programs](#), a minimum of four (4) hours (unless a lesser amount is approved in writing by school or program) of a professional skills tour, which may include a set visit and/or studio or production company department(s) exposure. No less than 5 students (plus a teacher or mentor chaperone) must participate in the tour to qualify. OUSD high school, Oakland-based community college and one of the [approved career-based non-profit programs](#), incentivize their top students and participants for the Professional Skills Tour.

### 5. Financial Contribution

Make a financial contribution to the media program at an OUSD high school, Oakland-based community college or one of the [approved career-based non-profit programs](#). Financial contribution can be no less than 1% of the estimated rebate.

Note: Approve in-kind donations with a value of 1% of the estimated rebate or more are also acceptable.

6. **Bespoke Proposal**, submitted by the approved applicant and approved by the Film Office or #MakeltBay

### NOTES:

For each of the above options we will have something like the following example from CFC  
[Classroom Workshop Verification Form](#)  
[Post-Completion Survey](#)  
[Video Testimonial Instructions](#)



## Oakland Workforce Development Board 2024 Meeting Calendar

<b>Full Board Meeting</b>	<b>Thursday - February 1, 2024</b>
<b>Executive</b>	<b>Friday - March 15, 2024</b>
<b>Full Board Meeting</b>	<b>Thursday - May 2, 2024</b>
<b>Executive</b>	<b>Friday – June 21, 2024</b>
<b>Full Board Meeting</b>	<b>Thursday - August 1, 2024</b>
<b>Executive</b>	<b>Friday - September 20, 2024</b>
<b>Full Board Meeting</b>	<b>Thursday - November 7, 2024</b>
<b>Executive</b>	<b>Friday - December 20, 2024</b>

***DATES AND TIMES SUBJECT TO CHANGE***