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SACRAMENTOWORKS

**SACRAMENTO WORKS, INC.
EMPLOYER OUTREACH COMMITTEE**

Date: Wednesday, September 26, 2018

Time: 9:00 a.m.

Location: SETA – Board Room
925 Del Paso Blvd.
Sacramento, CA 95815

AGENDA

1. Call to Order/Roll Call
2. **ACTION:** Approval of July 25, 2018 Minutes
3. **INFORMATION ITEM:** Regional Signature Business Event
4. **INFORMATION ITEM:** CalJOBS CRM Update
5. **ADJOURNMENT**

Committee Members: Larry Booth, Diane Ferrari, Troy Givans, Kim Gusman, Babette Jimenez, Fabrizio Sasso, Louise Stymeist, Sandra Waterhouse, Rick Wylie

This meeting is open to all members of the Sacramento Works, Inc. Board and the public.

DISTRIBUTION DATE: MONDAY, SEPTEMBER 17, 2018

Employer Outreach Committee
Minutes/Synopsis
(Minutes reflect the actual progression of the meeting.)

SETA Board Room
925 Del Paso Blvd., Suite 100
Sacramento, CA 95815

Wednesday, July 25, 2018
9:00 a.m.

1. **Call to Order/Roll Call:** Mr. Wylie called the meeting to order at 9:19 a.m.

Members Present: Larry Booth, Diane Ferrari, Babette Jimenez, Rick Wylie

Members Absent: Troy Givans, Kim Gusman, Fabrizio Sasso, Louise Stymeist, Sandra Waterhouse

Others Present: William Walker, Phil Cunningham, Roy Kim, Kathy Kossick

2. **ACTION:** Approval of June 13, 2018 Minutes

The minutes were reviewed; no questions or corrections.

Moved/Booth, second/Ferrari, to approve the June 13, 2018 minutes.

Roll call vote:

Aye: 4 (Booth, Ferrari, Jimenez, Wylie)

Nay: 0

Abstentions: 0

Absent: 5 (Givans, Gusman, Sasso, Stymeist, Waterhouse)

3. **ACTION:** Approval of FY 2018- 2019 Employer Outreach Budget

Ms. Kossick offered to answer questions not answered in the detailed board item.

Staff may recommend procuring a CRM tool to manage our employer contacts.

The Regional Business Summit will be producing some videos and marketing pieces to use at the summit and for employer outreach to maximize event attendance. EMRL staff will be invited to the next meeting to brainstorm on various ideas and to start planning for the summit event marketing.

Mr. Wylie stated that the board approved the budget and he anticipates that the funds will most likely be spent on marketing support and the CRM tool.

Moved/Booth, second/Jimenez, to approve the allocation of \$100,000 of Board Initiative funds to the Employer Outreach Budget for FY 2018-2019.

Roll call vote:

Aye: 4 (Booth, Ferrari, Jimenez, Wylie)

Nay: 0

Abstentions: 0

Absent: 5 (Givans, Gusman, Sasso, Stymeist, Waterhouse)

4. **INFORMATION ITEM:** Regional Signature Business Event

Mr. Wylie requested that staff send out the notes that Evan Schmidt provided at this morning's meeting. If anyone is interested in looking at the recommended list of speakers, that would be helpful. The final format, i.e., the selection and booking of speakers and panel participants, needs to be completed soon. A list of topics and speakers will be distributed to committee members. The keynote speaker was agreed on and it could be a good draw. Patrick Schwerdtfeger has indicated his interest in participating at this event. Mr. Wylie talked about Doug Kirkpatrick who was a key member of the Morningstar management team. He is now a consultant and key speaker and promoter of self-managed workplaces. Mr. Kim stated that he obtained additional quotes and received information on quite a few potential speakers. We have been given the rights to use the Region Rising logo.

5. **INFORMATION ITEM:** CalJOBS CRM

Mr. William Walker stated that he has narrowed down some training dates with EDD. It was decided to train two cohorts on August 16. There will be an in-depth hands-on training on CRM data input. There will be another training on how to generate reports on August 23. Staff is waiting for feedback from the other areas as to who they will send; there are 27 computers available. In the meantime, staff is researching a CRM that was specifically set up for workforce needs. After the August 16 training, the whole region will have a good idea what capabilities CalJOBS has available with the CRM system.

Ms. Ferrari asked that Dennis Petrie be informed about failures in the program and what needs to be done to improve the system. It seems like a duplication of money spent when EDD already has spent the money to develop the CRM; find out where there is no connection.

Mr. Walker stated that CalJOBS did not really think about business services; they were more concerned about tracking participant data for customers enrolled in WIOA programs. The workforce area needs more business services. Mr. Booth stated that it appears that there may be nothing wrong with the software; it is just not used. Ms. Ferrari stated that it is a brand new system but people need to sit down and learn about the system and find out what the system can do.

Ms. Carpenter will provide EMRL with preliminary information on the summit and marketing details. Staff will send Evan Schmidt's notes out to the committee members.

The next meeting is scheduled for Wednesday, August 22, 3 p.m.

6. **ADJOURNMENT**: The meeting was adjourned at 9:44 a.m.