



Monterey County Workforce Development Board

Strategic Planning 2026-2028

Goal #2 Add Industry Employers to the WDB and Retain Current Membership

Outreach Strategy (Q1 through Q4)

Define Board needs and Goals – WDB Mission and Vision

1. At the January 15, 2026, Executive Committee meeting, conduct a 1st Quarter Executive Committee SWOT (Strengths, Weaknesses, Opportunities, and Threats) exercise to assess current and future workforce needs to identify any specific skills and qualifications required or desired for new Board members.
2. At the February 19, 2026, Executive Committee meeting, identify specific employers in high growth areas and sectors – Health Care, Agriculture, Hospitality/Tourism, Advanced Manufacturing – as the primary focus areas for Board member recruitment.
3. At the February 19, 2026, Executive Committee meeting, identify relevant professional organizations for MCWDB outreach to identify potential Board members.
4. At the February 26, 2026, Board meeting, Board members to identify 3 potential organization and association members in high-growth sectors.
5. At the March 19, 2026, Executive Committee meeting, develop a clear message that highlights the unique value of the MCWDB.
 - a. Membership provides an opportunity to influence workforce strategies in Monterey County.
 - b. MCWDB brings together the key organizations working to train and employ Monterey County residents.
6. At the April 23, 2026, Board meeting, request current Board members to leverage social media platforms and professional organizations to promote MCWDB and its initiatives.
 - a. Create a Public Relations plan
 - b. Promote and hold an Open House
 - c. Ask Board members to use their social media and professional organizations to expand opportunities to meet with potential Board members.
 - d. Encourage referrals from current Board members to provide personalized outreach.
7. By the Executive Committee meeting of May 21, 2026, staff shall develop outreach materials for potential new board members to include:

- a. Mission/Vision
 - b. Impact Report
 - c. WDB funding
 - d. Time commitment and Board member responsibilities – clarify expectations
 - e. Talking Points for Board members/business cards/name tags
8. While requesting quorum for the Board meeting of June 25, 2025, suggest that members bring a potential board member to the WDB meeting.
 9. Board Chair and Executive Director will hold ongoing, in-person Board Member Orientation meetings with potential new Board members.

Board Retention Strategy (Q5 through Q8)

1. Pre-Orientation packet sent out once an individual is nominated to sit on WDB.
 - a. Bylaws
 - b. Strategic Plan
 - c. Organizational Chart
 - d. Calendar of meetings and events
 - e. Financial Reports
2. Implement a structured Board Member Orientation program to onboard new members.
3. Provide ongoing, relevant training on WIOA and industry trends.
4. All Board members to participate on Committees – Business Services or Career Services – to increase their deep knowledge of the work of the WDB.
5. Administer a Board Member Satisfaction Survey to obtain feedback from the Board members.
6. Board Chair checks in with new Board members at 30/60/90 days.
7. Ensure Board members are aware of opportunities for their Professional Development – CWA conferences, workshops, webinars.
8. Focus on results that foster a sense of accomplishment and purpose for Board members.

Goal #5 Fund Development Strategy (Q2 through Q8)

1. By April 30, 2026, Board meeting, develop a *purpose* for the Central Coast Regional Workforce Partnership (CCRWP) non-profit to include:
 - a. Mission/Vision
 - b. Develop Strategic Plan for the CCRWP
 - c. Conduct SWOT analysis related to funding
 - d. Develop Case Statement/Impact Report showing WDB outcomes and why donors should support the mission of CCRWP
 - e. Fund utilization report – review historical data of past donors
2. By May 30, 2026, identify funding strategies/priorities and align fundraising goals with overall strategic plan:
 - a. Target Potential Funders
 - b. Define Revenue Mix
 - c. Grants – Foundations
 - d. Local/Regional Grants
 - e. Corporate Partnerships - Employee Giving programs
 - f. Earned Income – provide fee-based programs/certifications to employers or individuals
 - g. Special Events
 - h. Embrace culture of philanthropy
3. By June 30, 2026, recruit a minimum of 3 new (non-WDB) Board members for the CCRWP non-profit, inform them of the results of steps 1 and 2 above, and request their input on purpose and strategies.
4. By June 25, 2026, engage stakeholders, and implement plan:
 - a. Engage CCRWP Board members, WDB members, and staff – define roles and responsibilities
 - b. Begin to develop fundraising strategy
 - c. Streamline giving process
 - Facilitate donations via MC Works website and/or other avenues.
 - d. Create communication and marketing strategy.

- Create consistent narrative showing impact to donors.
 - Develop Marketing Calendar to engage donors.
5. By the July 16, 2026, Executive Committee meeting, schedule a formal Brown Act meeting for the CCRWP members and WDB staff to fully develop their fundraising strategy.
 6. By the September 17, 2026, Executive Committee meeting, WDB staff will assist CCRWP members to develop a purpose statement and implement their fundraising strategy, including working to build long-term relationships for donor retention.
 7. Provide a presentation at the October 22, 2026, Board Retreat on CCRWP's fundraising plan and progress.
 8. By the November 19, 2026, Executive Committee meeting, and subsequently from Q5 through Q8, monitor and evaluate on a quarterly basis:
 - a. Fundraising performance against goals.
 - b. Fundraising plan. WDB staff will assist CCRWP to adjust the fundraising plan as needed, according to performance data or external factors.