

**Jim Doyle**  
Governor

**Paul Linzmeyer**  
Chair



Sue Gleason, Liaison  
201 E. Washington Avenue, Rm. A200  
P.O. Box 7972  
Madison, Wisconsin 53707-7972  
Telephone: (608) 266-0522  
Fax: (608) 261-6376  
Web site: <http://www.wi-cwi.org>

# Council on Workforce Investment

---

**Thursday, March 16, 2006**

**Hilton Milwaukee City Center  
509 W. Wisconsin Ave.  
Milwaukee, WI 53203  
(414) 271-7250**

## MEETING SCHEDULE

---

*Coffee, tea and soft drinks will be available at 9:00 a.m. for the Council Meeting.*

- 9:30 a.m. to 11:30 a.m. Full Council Meeting
- 11:45 a.m. to 12:30 p.m. Lunch for Council Members and Staff
- 12:30 p.m. to 2:30 p.m. Workforce Strategies Committee Meeting  
Workforce Systems Development Committee Meeting

All Full Council and individual Committee Meeting materials are available on the CWI web page at <http://www.wi-cwi.org>.

## Enclosed Meeting Packet Contents

---

- Page 1 March 16<sup>th</sup> Meeting Schedule and Packet Contents
  - Page 2 Map to March 16<sup>th</sup> Meeting
  - Page 3 March 16<sup>th</sup> Full Council Meeting Agenda
  - Page 4 December 9, 2005 Full Council Meeting Draft Minutes
  - Page 7 Recommendations to the Governor on the Workforce Development System
  - Page 10 Ad Hoc (Milwaukee) Committee Report Recommendations
  - Page 18 CWI Project Funding Process, Revised
  - Page 25 Use of CWI Program Years 2005 and 2006 Funds
  - Page 26 CWI Special Project Solicitation
- Additional Document Linked – Governor's Letter in support of Medicaid Infrastructure Grant

*This is a public meeting; the meeting location is handicapped accessible. If you have other special needs such as an interpreter or written material in an alternative format, please contact Gloria Kirchoff at (608) 267-2191 or email [Gloria.Kirchoff@dwd.state.wi.us](mailto:Gloria.Kirchoff@dwd.state.wi.us).*

## Map and Directions to the Meeting

Downtown Milwaukee continues to experience construction on its Marquette Interchange. For current driving directions, including ramp closures, please visit [www.mchange.org](http://www.mchange.org).

### Basic Directions

#### Directions From I-94 Driving Northbound

From Chicago/Racine/Kenosha

1. Take 94 To 794 E
  2. Exit Plankinton Street
  3. Turn Left To Michigan St Street
  4. Turn Right Onto 5th Street
- End 509 W Wisconsin Ave

#### Directions From I-94 Driving Eastbound

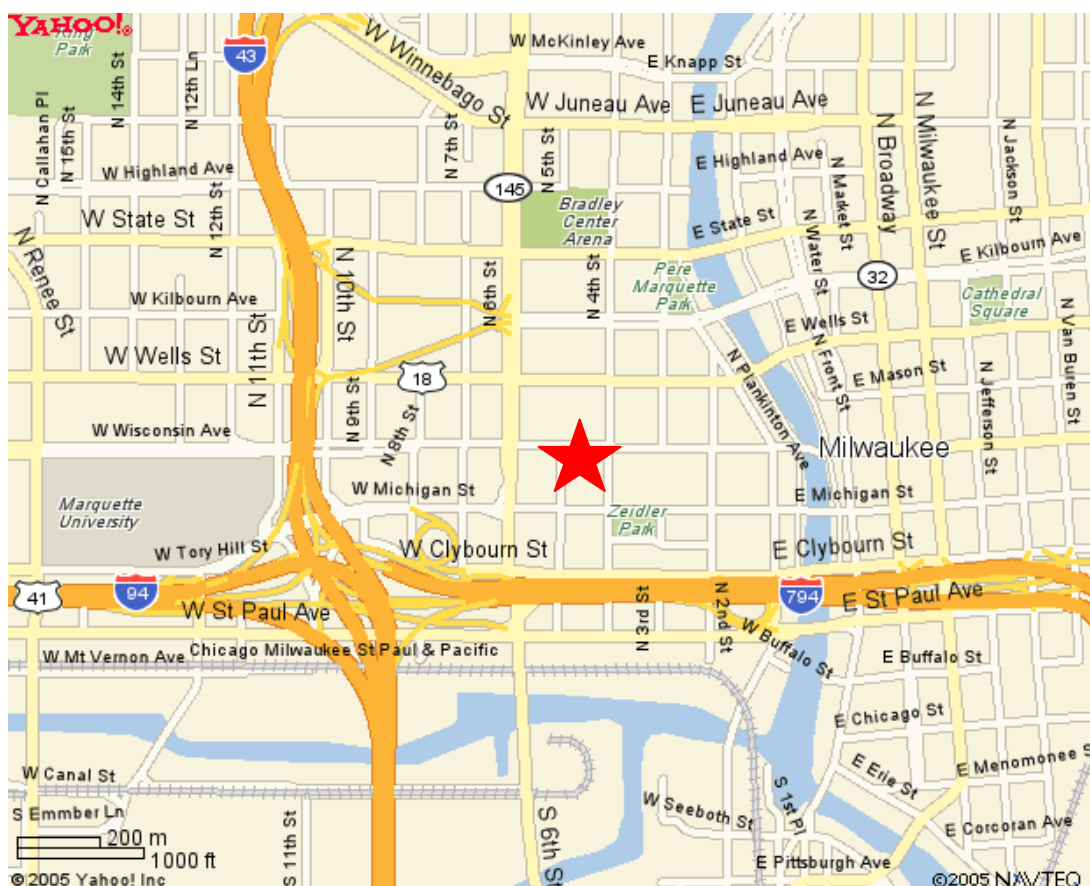
From Madison

1. Take 94 East To Civic Center/J Lovell Exit
  2. Turn Left Onto J Lovell Street
  3. Turn Right Onto Michigan Street
  4. Turn Left Onto 5th Street
- End At 509 W Wisconsin Ave

#### Directions From I-43 Driving Southbound

From Sheboygan/Appleton/Green Bay

1. Take 43 South
  2. Exit Mckinley Blvd. East
  3. Turn Right Onto 6th Street
  4. Turn Left Onto Michigan Street
  5. Turn Left Onto 5th Street
- End 509 W Wisconsin Ave



# COUNCIL ON WORKFORCE INVESTMENT

March 16, 2006  
9:30 a.m. to 11:30 a.m.

Hilton Milwaukee City Center  
509 W. Wisconsin Ave.  
Milwaukee, WI 53203  
(414) 271-7250

## FULL COUNCIL MEETING AGENDA

- I. Call to Order and Welcome
- II. Minutes of December 9, 2005 Meeting (**For Action**)
- III. CWI Committee Reports and Policy Recommendations
  - A. Workforce Systems Committee (**For Action**)
    1. Policy Recommendations on Wisconsin's Workforce System and the Milwaukee Workforce System
    2. Committee Activity Update and Future Issues
  - B. Executive Committee
    1. Policy Recommendations (**For Action**)
      - CWI Project Funding Process, Revised
      - Use of CWI 2005/2006 Funds and Special Project Solicitation
    2. Dislocated Worker Subcommittee Report-Phil Neuenfeldt
    3. Bridges to Work - Medicaid Infrastructure Grant Strategic Plan -- Representative Josh Zepnick
  - C. Workforce Strategies Committee
    1. Status Report on Regional Metrics Proposal and GROW Region by Region Grants
    2. Committee Activity Update and Future Issues
- IV. Announcements and Adjournment

# COUNCIL ON WORKFORCE INVESTMENT

*(Draft Pending Approval)*

## MEETING MINUTES

December 9, 2005 -- Madison, Wisconsin

**Members Present:** Paul Linzmeyer (chair), Joel Rogers (vice-chair), Thomas Burse, William Chaudoir, Barbara Fleisner, Greg Gasper (for Sen. Joe Leibham), Mary Lu Gerke, James Haney, Susan Hatch, John Heyer, James Hill, Ellen Holt, Erica Kauten, Tina Koehn, Douglas Moquin, Fredi-Ellen Bove (for Helen Nelson), Aaron Olver (for Mary Burke), Mark Reihl, Donald Rouse, Christopher Ruud; Julia Taylor, Norma Tirado-Kellenberger, Joan Wilk, Rep. Josh Zepnick, John Wagnitz (for Sen. Dave Hansen)

**Members Absent:** Lyle Balistreri, Elizabeth Burmaster, Dan Clancy, Rodney Copes, Jewel Currie, Kathleen Drengler, Mathew Frank, Roberta Gassman, Xiong Lo, Phil Neuenfeldt, A. Kent Olson, Lee Rasch, Patrick Schillinger, John Scocos, Georgann Stinson, David Vierthaler, Dean Welch

**CWI Staff Present:** Sue Gleason, Fred Bartol, Sheryl Billups, Gloria Kirchoff, Mary Pasholk, Linda Williamson, Ron Danowski

**Others Present:** Kay Moormann (WTCS, for Dan Clancy); Connie Colussy, Dianne Reynolds, and Jessalyn Frost (DWD/DWS); Michael Greco and Rick Hall (DWD/DVR); Terry Ludeman, Eric Grosso and Jeff Sachse (DWD/OEA); Molly Michels (DHFS); Teresa Barch (WATJE); Francisco Sanchez (WOW WDB); Dale Hopkins and Pat Schramm (South Central WDB), Bob Borremans (Southwest WDB), Dick Best (West Central WDB), Steve Terry (Northwest WI WDB), Beth Norris (Southeast WDB); Kira Dahlk (Jobs with a Future)

### Key Issues/Discussion

#### I. Call to Order, Minutes of Last Meeting and Opening Remarks

Paul Linzmeyer (chair) called the meeting to order at approximately 9:45 a.m. A motion to approve the minutes of the September 16 meeting was seconded and approved unanimously.

Linzmeyer introduced three new members to the CWI who were present -- Bill Chaudoir, Erica Kauten, Mary Lu Gerke. He also noted that Dan Andrist, a WTCS student, was also appointed, but was unable to attend the meeting. Linzmeyer also recognized Dale Hopkins, South Central WDB, and Terry Ludeman, DWD/Office of Economic Advisors, both of whom are retiring in the next few weeks. His comments focused on the extensive contribution each has made to the state's workforce development system during their many years of service.

#### II. Presentations

##### A. Wisconsin's Workforce Development Boards

Teresa Barch provided an overview of the Wisconsin Association of Job Training Executive's (WAJTE) purpose and objectives and the key roles Workforce Development Board's play in the regional workforce development system. She referred Council members to the recent WAJTE publication that provided an overview of each of Wisconsin's WDBs, including a brief area profile and key accomplishments. She also noted some of the key challenges faced by the Boards, including reduced funding, lack of partner support for the one-stop system infrastructure, and specific challenges related to preparing a skilled workforce. She suggested that the CWI and DWD could provide more of the state discretionary WIA funds to WDBs to assist them in addressing these challenges.

Dick Best (West Central WDB) and Beth Norris (Southeast WDB) each provided a brief overview of their respective WDBs.

- Best focused on the diverse nature of his workforce development area, the WDB's efforts to develop a more integrated system and related work with the area's education and economic development partners, and the WDB's shift from a program focus to a more strategic vision.
- Norris noted that her WDB is distinguished by its highly decentralized system and the area's strong manufacturing base. She noted that while job growth is occurring in other areas, manufacturing remains a key industry for the area and is growing. Among challenges she noted were a growing immigrant population and the gap between the higher skills needed by employers and a workforce with low educational attainment.

During discussion, CWI members raised several questions/issues, among them:

- How much funding is available and what authority does the CWI have with respect to the WIA discretionary funds? Sue Gleason, noting that the state has approximately \$4.5 million in discretionary funds, explained how funds were allocated (e.g., administrative funds for staff, IT, etc. and special projects, including \$500,000 for the CWI to use for its projects). She further noted that a key effort by DWD is to use the WIA discretionary funds to leverage other dollars/resources.
- How many non-retail businesses are there in a workforce development area and what percentage of those does a WDB typically have a relationship with? Norris noted that in her area, there were approximately 16,000 businesses and the WDB had working relationships with about 500, through the Job Center account representatives. The Job Centers identify and try to work more closely with higher wage employers.
- What level of interaction is there between WDBs and technical colleges? It was noted that the relationships vary and strengthening relationships is a good idea.

Linzmeyer wrapped up the conversation noting several key issues: connecting the supply and demand, diversity, meaningful interaction with business leaders and the need for business "champions" on the local boards, and the importance of regional initiatives to advancing responses to regional skill needs.

## **B. Jobs With a Future**

Kira Dahlk (Director, Jobs with a Future) provided a brief overview of JWF program which operates in the South Center area and is expanded into the Southwest area as part of the CWI GROW regional grant. Dahlk highlighted the program's focus on building partnerships/collaboration among public sector institutions and employers and then bringing the two together to advance workforce development efforts in the region. This dual infrastructure of institutional and employer-based collaboration leads to tangible results for employers, for workers and for institutions. Pat Schramm (South Central WDB Director) highlighted the key challenges and lessons learned from implementing strategy, among them:

- Must have a financial strategy up front from the WDB and from other institutional partners
- Must apply fundamentals to overall business and align with all resources
- Must make a serious commitment to collaboration and work very hard and long at it
- It is not a short term strategy, but it is worth it -- it leads to real benefits

## **C. Regional Metrics Initiative**

Terry Ludeman, DWD Economist, provided a brief overview of the Regional Metrics Proposal.

Discussion and questions focused on a range of issues, among them:

- The purpose of the system and how it would be used, including comparisons with other parts of the country (but not competitive within the state)
- Recognition that several regions are starting to work on their own regional metrics and that the state proposal needs to take those efforts into consideration
- Need for broad input, including regional plan commissions
- Suggestions for other/additional metrics (e.g., entrepreneurial measures)
- May not be able to include all metrics desired at state level (difficulty in collection), but need to start at some point of time and consider improvements later.

**Action:** Linzmeyer entertained a motion to accept the proposal concept and refer it to the Workforce Strategies Committee for further development. Rep. Zepnick moved approval of the motion; it was seconded and passed unanimously.

### III. Council 2005 Progress Review and 2006 Priorities

Sue Gleason provided a brief overview of what the CWI has accomplished over the last year and a half and its goals/objectives for the coming year (as defined by the recent *CWI Report to the Governor*). Joel Rogers summarized what it is the CWI is trying to do -- to improve system performance to benefit workers, business, and tax payers and to encourage business to organize into groups and pursue "high end" strategies. The strategy focuses on "how", "sectors" and "system" -- better coordination between economic development and workforce development, industrial clustering, and system change. Rogers noted two groups that are working at the state level to advance communication, collaboration and coordination across state agencies and educational institutions -- the SIT (State Interagency Team), which is comprised of state agencies who participate on the CWI, and a new group, the SAT (System Alignment Team) that includes the Governor's Office, CWI and state agencies and educational institutions (technical college and UW).

**Action:** Rogers recommended that the CWI focus 2006 efforts on developing a comprehensive set of recommendations that can be transmitted to the Governor. Representative Zepnick moved to accept the recommendation; John Heyer seconded the motion and it passed unanimously.

### IV. Committee Reports

#### A. Executive Committee

Linzmeyer briefly reviewed Executive Committee actions, highlighting the Committee's action to approve funding for a study of dislocated workers and its plans to consider revisions to the CWI's funding process. He noted that he hopes to have a "rich discussion" about how the CWI handles RFPs within the context of revisions to the funding process at the next CWI meeting. Linzmeyer asked chairs of the two subcommittees to report on their activities.

- Medicaid Infrastructure Grant Subcommittee -- Representative Zepnick summarized the strategic planning efforts under taken and referred members to a handout that highlighted the strategic planning process and strategic priorities for the next several years. He noted that he would like to be on the March CWI agenda for a more in-depth discussion of the project.
- Dislocated Worker Subcommittee -- Jim Haney reported that the Subcommittee has distributed approximately \$2.2 million to six grantees since the last meeting. He noted that they have distributed nearly all of the approximately \$5.5 million available this year, though lay-offs/plant closings are continuing in Wisconsin. He also noted that the Executive Committee approved a proposal recommended by the Subcommittee to study the impact of dislocated worker services on employees laid off from Advanced Transformer in Platteville.

#### B. Workforce Strategies Committee

Barbara Fleisner reported on Workforce Strategies Committee activities on behalf on the co-chairs who were not able to attendance. She highlighted the Committee's recommendation to the full CWI to endorse the Regional Metrics proposal concept and refer it back to the Strategies Committee for further development. She also reviewed the Committee's action to recommend full Council endorsement of the Wisconsin Technical College's Advance Manufacturing Initiative, with referral back to the Committee to consider potential "next steps" on a broad advanced manufacturing effort.

#### C. Workforce System Design Committee

Christopher Ruud, new co-chair, highlighted the work on the Milwaukee region, specifically the UW Milwaukee landscape project, findings of which will be released publicly in February, and the work of the Ad Hoc Committee, which plans to issue its recommendations for Council consideration in March. Ruud also said that they will address "dash board" measures for the workforce system and prioritize action steps related to advancing the Committee's objectives and strategies.

There being no further business, the meeting was adjourned.

**Workforce System Development Committee Approved February 17, 2006  
Recommendations to the Governor  
for the  
Council on Workforce Investment  
March 16, 2006 Meeting**

The Council on Workforce Investment (CWI) is advisory to the Governor on Wisconsin's workforce investment system strategies and policies. To enhance the operation and performance of the state's workforce programs, the CWI respectfully submits the following recommendations to Governor Jim Doyle.

**Vision**

**Combine all the Workforce Investment Act required partner agencies under one governing organizational umbrella and one funding structure, with the intent to create a common direction and improved system efficiencies all the way through to the regional and local level.**

**Recommendation 1**

**The Department of Workforce Development administers 10 of the 17 required partner programs. We recommend a first step toward the vision is to create a consolidated organizational structure to govern these programs and hold them all accountable to support the vision of a One-Stop model down to the regional and local levels.**

**Recommendation 2**

**Streamline the funding process.**

**We recommend that the Governor communicate to Congress, the State Legislature, and all involved federal departments that we need to have new laws/reauthorizations begin to fit together the array of programs to provide efficiencies in the administration of and service delivery for customers.**

**Specific areas for co-program coordination include (a) create one planning and funding cycle, (b) consistent reporting criteria, (c) consolidated application process across programs for customers (d) consistent performance measures.**

**Recommendation 2a**

**We also propose an interim step for streamlining the funding process – Begin with the Governor directing the Department of Workforce Development's program administrators to negotiate common waiver requests to their federally funded agencies for the purpose of program efficacy within a fluid, coordinated One-Stop system.**

**Recommendation 3**

**Create sustainable financial support for the One-Stop infrastructure.**

**We recommend another first step as the Governor direct his Cabinet and all accountable agencies to (a) create financial incentives for One-Stop participation and involvement; (b) design a "fair share" allocation method among all of the state-administered workforce training and employment placement programs; (c) develop a measurable scorecard to create accountability within the infrastructure**

## Discussion and Background

The CWI's Committee on Workforce System Development identified priority action steps related to their objectives and strategies that were in the CWI's *2005 Annual Report to the Governor*. The recommendations are intended to provide a sustainable financial infrastructure with federal, state and private-sector funds and implement the first action step: "Review Inventory of State job placement and employment-training programs to assess how to provide sustainable financial support for the One-Stop infrastructure, maximize resources for effective service delivery, and identify possible options to minimize the number of persons/agencies distributing funds."

The recommendations above address the issues that were identified as core impediments in the current system:

- Program funds come from varied sources with a multiplicity of administering entities that compound overhead costs, inevitably creates duplicity of services, and diminishes authority and accountability.
- Interagency dialogue exists but there is not a focal point of authority that would ensure common visions, on-going joint strategic planning and implementation, mutual accomplishments and measures of success/failure.
- The lack of creative thinking to transcend silo-program funding is problematic. The primary justification for each administering entity having their own "agenda" rather than cooperatively working within a workforce system framework is the fact that every workforce development program funded with federal and state funds has different requirements and performance measures.
- Authority for program operations is not only diffused but appears to have a bottom-up system given the Workforce Development Board's relative autonomy, and the lack of alignment throughout top to bottom and visa-versa.
- Historically, there have been band-aid solutions that have not resulted in systemic improvements, hence, the need for radical shifts in state structure and operations of these programs.

On behalf of the CWI, the Workforce System Development Committee conducted a variety of activities to garner input on these issues and reviewed a large volume of material, including:

- Surveying the 11 Workforce Development Board's Executive Directors, Private-sector Chairs and the Chief Local Elected Officials;
- Holding a Job Center Roundtable Listening Session with workforce program partners to gather field input on "how to design a successful, flexible and efficient system from a blank sheet of paper";
- Meetings held at Milwaukee Job Center North, the Private Industry Council of Milwaukee County, Inc., Workforce Development Center of Waukesha County, Marathon County Job Center; and
- Reviewed salient material including:
  - Local Job Center Customer Satisfaction Surveys
  - Inventory of Wisconsin's Workforce, Education and Training Programs*, June 2005
  - Labor Market Data
  - The Impact of Budget Cuts on Wisconsin's Job Centers: Staff Losses and Service Declines*, Center on Wisconsin Strategy, March 2004
  - Declining Federal Support for Wisconsin Workforce Development*, Center on Wisconsin Strategy, July 2004
  - An Evaluation of Employment and Job Training Programs*, Legislative Audit Bureau, November 1994

**State Workforce Education and Training Programs by Funding Level  
2005-2006**

(One year funding starting July 1, 2005, October 1, 2005, or January 1, 2006, depending on source.)

Program	Funding Level	Agency	Job Center Partner
<b>Education, Training &amp; Related</b>			
Vocational Rehabilitation	\$ 67,158,436	DWD	X
Wisconsin Works	59,785,135	DWD	X
Workforce Investment Act	44,985,136	DWD	X
Community Development Block Grant	19,488,100	Commerce	X
Food Share Employment/Training	16,220,937	DWD	X
General Purpose Revenue Grants (varied)	13,861,700	WTCSB	
Wagner-Peyser Labor Exchange	13,765,276	DWD	X
Carl Perkins Voc Ed - Post Secondary	10,839,800	WTCSB	X
Trade Adjustment Assistance	10,800,000	DWD	X
Carl Perkins Voc Ed - Secondary Ed	10,029,106	DPI	X
Community Services Block Grant	7,632,915	DHFS	X
Adult Education & Family Literacy	6,531,300	WTCSB	X
SBDC Training & Consulting Services	4,657,000	UW Ext	
Veterans Educational Grants	3,529,000	DVA	
Brighter Futures Initiative	3,456,500	DHFS	
Customized Labor Training	3,125,000	Commerce	
Veterans Employment & Training (LVER/DVOP)	2,991,000	DWD	X
Wisconsin Entrepreneurs Network	2,468,500	UW Ext	
Senior Community Services Employment	2,235,054	DHFS	X
Tech Prep, Carl Perkins Title II	2,001,500	WTCSB	X
Refugee Employment and Training	1,750,000	DWD	
Reemployment Services (UI Profiling)	1,600,000	DWD	X
Youth Apprenticeship	1,100,000	DWD	
Apprenticeship	1,735,000	DWD	
Veterans Assistance Program	1,319,045	DVA	
Children First	1,140,000	DWD	
Community Based Economic Development	712,200	Commerce	
DCFS Scholarship Program	687,591	DHFS	
Jobs and Business Development	537,500	DWD	
Retraining Grant	378,000	DVA	
WI Resource Center Voc Workshop	163,000	DHFS	
Troops to Teachers	161,000	DVA	
Business Employees Skills Training	100,000**	Commerce	
WI Resource Center Pre-Release	92,000	DHFS	
<b>Income Replacement/Cash Benefits</b>			
Unemployment Insurance Benefits	\$ 57,100,000*	DWD	X
Wisconsin Works Cash Benefits	52,441,965	DWD	X
Trade Adjustment Assist. Allowance	36,800,000	DWD	X

\*UI benefit payment budget figure based on US DOL "resource justified" budget model; level is expected to increase based on actual experience.

**Workforce System Development Committee Approved February 17, 2006  
Ad Hoc Committee (Milwaukee) Report  
to the  
Council on Workforce Investment  
March 16, 2006 Meeting**

**Recommendations**

Notwithstanding all of the accomplishments to date by Milwaukee's many workforce development organizations, the *Ad Hoc* Committee has proposed a number of recommendations to further improve on these efforts as well as expand the network for cooperative initiatives and create systemic changes. Clearly, Milwaukee has riches within the business community, a quality array of employees and a multitude of resources that, if coordinated appropriately, could create a dynamic workforce system to best serve employers and job seekers. **The recommendations intend to support the following goals:**

- **Employer engagement and coordination in workforce development efforts.**
- **A well-trained and prepared regional workforce within an employer-driven system for job placement and advancement of workers.**
- **Public and private investment in Milwaukee's workforce development with a collective and coordinated agenda.**

**Recommendation # 1**

- **Create a Leadership Team.**

**DWD convenes a Milwaukee leadership team that includes representatives from the Mayor's Office, the Private Industry Council of Milwaukee County, Milwaukee Area Technical College, a representative from the Milwaukee 7 group, and a Mayoral appointee from the business community/private sector.** The team will finalize its charge based on CWI recommendations and also connect to other ongoing efforts such as regional Milwaukee 7 and CWI *GROW* initiatives. The team will develop specific tasks and timelines to address the charge and identify what individuals/organizations will be responsible. The team and related leaders will report on progress to the CWI and Workforce System Development Committee at three month intervals over the next year, to be reevaluated at the end of the year.

**Recommendation # 2**

- **The Charge that will be part of the Leadership Team's goals and objectives:**
  - A. The Leadership Team should establish a task force of workforce decision-makers with high-level employers and policy-makers at the table to identify common solutions for an improved delivery system in Milwaukee.**
    - Improve coordination at the state, regional and local levels:**
      - (1) Develop goals with measurable outcomes for cross-program activities that would be grounded in their local plans, state and local policies, etc. as part of joint planning and resource sharing;
      - (2) Design procedures/processes for activity implementation that ensures efficiencies; and
      - (3) Focus activities to support key economic development efforts.

- Coordination at the state level** among agencies administering the workforce and related programs, including their oversight bodies such as the Governor's Council on Workforce Investment must focus on these areas:

  - (1) Current available resources;
  - (2) Collaboration on joint grant proposals for future funding;
  - (3) Employer engagements; and

Broaden efforts with economic development agencies.
  
- B. Put the "One-Stop" back into a cohesive Job Center System.**  
**Design and implement a truly one-stop service delivery system for all customers (employers and job seekers) that transcends program funding. Coordination at the regional and local levels must maximize service delivery, eliminate duplication of services, and garner support of private foundations.**

  - (1) Identify joint activities with measurable outcomes (such as specific training needs of job seekers) and implement strategies across programs;
  - (2) Link with employers for their full engagement and economic development players on a regular basis; and
  - (3) Establish common solutions to improve infrastructure issues (such as co-sharing of resources).
  
- C. Create a Consortium for Improved Training Services.**  
**Expand the current WDB/PIC collaborators** to improve and increase training services for job placement in construction, skilled trades, health care and emerging industries across all programs with cross-partner and employer involvement for:

  - (1) Short-term training along with appropriate job placement support (such as English as a second language);
  - (2) Long-term training after job placement (e.g. new incumbent worker training programs) to meet continued private sector skill needs and improve the self-sufficiency of employees; and
  - (3) Blended funding mechanisms to support these focused training activities.
  
- D. Develop a system for the collection and dissemination of easily accessible workforce, employer-focused information** for job seekers, employers, the economic development community and funders using the recommendations from the UWM report and from the listening sessions with stakeholders as a stepping-off point.

### Recommendation # 3

- DWD will take the lead in defining the "system" and broadening the current model using the suggestions in the UWM report and from the listening sessions.**

The broad workforce development system network must be inclusive of any organization providing workforce development services, education and training that desires to be incorporated into the system. While the traditional workforce "system" has focused on the Workforce Investment Act's required one-stop partners, this must be expanded to include all of the players for full collaboration, development of mutual goals and a vision to reshape a coordinated workforce delivery system. A transparent network of workforce training and related services must include all organizations in order to best serve employers and job seekers, to garner support of private foundations as well as to ensure non-duplication of services.

## **Workforce System Development Committee Approved February 17, 2006 Ad Hoc Committee (Milwaukee) Report**

### **Background**

The Council on Workforce Investment (CWI) is a state board that advises Governor Jim Doyle on Wisconsin's workforce investment system strategies and policies, and undertakes research and other activities to assist the Governor in enhancing the operation and performance of the state's workforce programs. One of the CWI's standing committees, the Workforce System Development Committee, established an *ad hoc* committee on April 22, 2005 to (a) provide oversight of the "Understanding Milwaukee's Workforce Development Landscape" project conducted by the University of Wisconsin-Milwaukee School of Continuing Education, Center for Workforce Development, and (b) identify Milwaukee and regional systemic workforce development issues and develop recommendations for action by the full Committee and CWI.

The membership of the *Ad Hoc* Committee:

- Chair, Thomas L. Burse, President, Buveck Consultants/Construction Managers, Milwaukee
- Bill Clingan, Division Administrator, for Secretary Gassman, Department of Workforce Development
- Tina Koehn, Vice President of Administration, United Migrant Opportunity Services, Menomonee Falls
- Donald L. Rouse, retired Vice President Corporate Operations, Kohl's Department Stores, Hartland
- Georgann Stinson, Vice President, General Converters and Assemblers, Racine
- State Representative Josh Zepnick, Wisconsin Assembly 9<sup>th</sup> District, Milwaukee

The charge of the *Ad Hoc* Committee was approved at the June 3, 2005 Workforce System Development Committee meeting: To provide

(A) Recommendations to the full Committee on Milwaukee issues within Workforce Development Area (WDA) #2, including

- Systemic One-Stop Partner Program Collaboration, Coordination and Joint Planning
- Support of Infrastructure and Overcoming Silo-Program Funding Constraints
- Oversight for the "Understanding Milwaukee's Workforce Development Landscape" Project

(B) Recommendations to the full Committee on Regional Issues, including

- Regional One-Stop Partner Program Collaboration and Coordination within the three WDAs: # 1 Southeastern Wisconsin, # 2 Private Industry Council of Milwaukee County, Inc. and # 3 Waukesha-Ozaukee-Washington Counties
- Joint Regional Planning and Economic Development Drivers among the WDAs # 1, 2, 3

### **Fact Finding and Coordination**

*Ad Hoc* Committee members reviewed the major key stakeholders in Milwaukee and the region that influence workforce activities ranging from specific Job Center direct services for job seekers and employers to new economic development initiatives. Three categories of stakeholders were identified for purposes of direct input to assist in identifying problems and solutions:

- Workforce required partners of the Workforce Investment Act (WIA)
- Economic development and labor entities
- Funders, foundations and civic entities

Employers were also on the initial list as another vital stakeholder group. However, as the input process continued, it became clear that until specific recommendations and/or initiatives were shaped for businesses to participate in, employer connections needed to be part of a later phase in recommendation implementation. In the meantime, private sector members who serve on the three Workforce Development Boards were apprised of the Committee's work.

The Committee held two listening sessions with invitees from representatives of partner programs, economic development and labor organizations. In addition, representatives from funding, foundations and civic entities were interviewed by the University of Wisconsin-Milwaukee, Center for Workforce Development (UWM-CWD) staff. UWM-CWD staff summarized information from those interviews for the Committee based on identified themes. In total, the Committee held eight meetings that were open for public participation from June 2005 to February 2006.

[Appendix A: Participant Lists]

The themes for the formal input were aligned with the Workforce System Development Committee's major objectives:

- Level of leadership within the community and among the Workforce Development Board, and ideas for collaboration/coordination with workforce partners and external entities for effective service delivery
- Ideas to align common goals and joint local and regional planning (with linkages to economic development initiatives and labor market)
- How to overcome "silo-program" funding

The UWM-CWD "Understanding Milwaukee's Workforce Development Landscape" project was another major piece in the Committee's development of recommendations. This project was initiated by the Workforce System Development Committee in order to gather more information about the Milwaukee workforce system. It was funded by the CWI's state WIA funds administered by the Department of Workforce Development (DWD). The two main project objectives were:

- To identify and survey training/workforce providers in Milwaukee County and to incorporate the information in the Workforce Enterprise website as a one-stop portal clearinghouse with a quick glance reference format
- To survey Milwaukee workforce organizations, compile information about the current Milwaukee County workforce system, and provide recommendations for improvements

The Committee reviewed UWM's draft survey instruments that were used for their stakeholder interviews. Status reports on this project were provided at every Committee meeting with substantive discussions on key issues raised during both the Committee and UWM's input processes. The Committee's background work dove-tailed with UWM's efforts, and culminated in joint recommendations. [Appendix B: Executive Summary of UWM's "Understanding Milwaukee's Workforce Development Landscape" Project]

The Committee wishes to thank Dr. Sammis White and Jennifer Riggerbach as authors of the report, with special thanks to Stephen Adams, Community Development Management Partnerships; David Berkley, DDM Management Strategies; and, Tracie Thacker, Independent Consultant, for their work in surveying the workforce development organizations.

## Appendix A

### Participant Lists

*Ad Hoc* Committee listening session stakeholder participants:

Brenda Bell-White, Wisconsin Works/Temporary Assistance to Needy Families  
Enid Glenn, Vocational Rehabilitation, Department of Workforce Development  
Sheila Knox, Job Service, Milwaukee  
Al Luna, Milwaukee Area Technical College  
Eric Parker, Wisconsin Regional Training Partnership  
Paula Penebaker, YWCA  
Gerard Randall, Private Industry Council of Milwaukee County, Inc.  
Herbert Robinson, Department of Corrections  
Leonore Rosas, United Migrant Opportunity Services  
Debbie Roy, Manpower  
Jerry Stepaniak, Maximus  
John Stilp, Milwaukee Area Technical College

UWM's stakeholder interviews conducted for the *Ad Hoc* Committee:

Essie Alan, United Way  
Kathryn Dunn, Helen Bader Foundation  
Eloisa Gomez, Making Connections  
Raejean Kanter, Potawatomi Foundation  
Steven Mahan, City of Milwaukee Community Block Grant Office  
Alicia Manning, Bradley Foundation  
Jane Moore, Greater Milwaukee Foundation  
Rita Neises-Renner, Making Connections

Other attendees at *Ad Hoc* Committee meetings:

Stephen Adams, Consultant to University of Wisconsin-Milwaukee  
Kathy Areiszewski, Matt Talbot Recovery Center  
Teresa Barch, Wisconsin Association of Job Training Executives  
David Berkley, DDM Management Strategies  
Sheryl Billups, Office of Economic Initiatives, Department of Workforce Development  
Dick Buschmann, Making Connections  
Theola Carter, Office of Economic Initiatives, Department of Workforce Development  
General Cocroft, Private Industry Council of Milwaukee County, Inc.  
Lea Collins-Worachek, Job Service, Milwaukee Workforce Development Area  
Connie Colussy, Bureau of Workforce Programs, Department of Workforce Development  
Sally Cutler, North Central Wisconsin Workforce Development Area  
Shelly Flaten-Moore, Waukesha-Ozaukee-Washington Workforce Development Area  
Sue Gleason, Office of Economic Initiatives, Department of Workforce Development  
Enid Glenn, Division of Vocational Rehabilitation, Department of Workforce Development  
Delores Graves, Private Industry Council of Milwaukee County, Inc.  
Mike Irwin, Kaiser Group  
Mark Kessenich, Private Industry Council of Milwaukee County, Inc.  
Diane Knutson, Job Service, Waukesha-Ozaukee-Washington Workforce Development Area  
Theresa Loerke, Bureau of Workforce Programs, Department of Workforce Development  
Mary Moore, Unemployment Insurance, Department of Workforce Development  
Michael Mortell, Waukesha-Ozaukee-Washington Workforce Development Area  
Beth Norris, Southeastern Wisconsin Workforce Development Area  
Dianne Reynolds, Bureau of Workforce Programs, Department of Workforce Development  
Jennifer Riggerbach, University of Wisconsin- Milwaukee, Center for Workforce Development  
Christopher Ruud, Business Co-Chair, CWI Workforce System Development Committee

**Continued** other attendees at *Ad Hoc* Committee Meetings:

Francisco Sanchez, Waukesha-Ozaukee-Washington Workforce Development Area  
Tracie Thacker, Milwaukee Community Services Corporation  
Paul Vornholt, City of Milwaukee Mayor's Office  
Paul Wechter, Private Industry Council of Milwaukee County, Inc.  
Samuel White, University of Wisconsin Milwaukee, Center for Workforce Development  
Dave Wilson, Private Industry Council of Milwaukee County, Inc.

Other contacts initiated for coordination:

Bill Mitchell, Waukesha County Economic Development Committee  
Pat O'Brien, Greater Milwaukee Economic Development Partnership  
Julia Taylor, Greater Milwaukee Committee

Staff to the *Ad Hoc* Committee:

Pamela O'Brien, Workforce Investment Act Section, Division of Workforce Solutions, Department of Workforce Development  
Mary Pasholk, Bureau of Job Service, Division of Workforce Solutions, Department of Workforce Development  
Linda Williamson, Employment Connections Section, Division of Workforce Solutions, Department of Workforce Development

## **Appendix B**

### **University of Wisconsin- Milwaukee School of Continuing Education Center for Workforce Development**

#### **Executive Summary**

#### **Understanding Milwaukee's Workforce Development Landscape**

##### **Background**

A well-educated, skilled workforce is essential to Milwaukee's achieving long-term economic success in the 21st Century global economy. In order to build the flexible and knowledgeable workforce Milwaukee needs, local stakeholders in workforce development need to build a system that provides an integrated continuum of education and training that meets the changing needs of local employers and industries.

There is common agreement that Milwaukee's workers' skills are not what they should be, and the efforts to increase those skills are insufficient, uncoordinated, and under-funded. These deficiencies must be overcome if Milwaukee's economy is to succeed.

##### **Purpose and Design of the Study**

This study was undertaken to generate a better understanding of the workforce development landscape in Milwaukee County in order to develop a strategy to create and retain a workforce with the education and skills to serve our changing local marketplace. The study consisted of two parts:

The first part consisted initially of identifying the organizations and individuals thought to be most active in current workforce development efforts. Interview with thirty-four (34) of these individuals were completed. The interview's consisted of a structured set of questions that were asked to all respondents, plus a sub-set of questions aimed at private foundations.

The second part of the study involved the identification of about 120 organizations involved in some phase of workforce development. Detailed information was gathered about the nature of their involvement, their funding sources, how many individuals they served, etc. This information will be housed on the WorkforceEnterprise.org website.

##### **Findings**

From the national level on down, there is a changing focus within the Workforce Development System, involving a shift away from a social service model focused on job seekers to a demand-driven model focused on employers and industry needs. Milwaukee's workforce system is still entrenched in a social service model that has created the perception that Milwaukee County Job Centers are designed solely to serve W-2 clients. Such a perception has a great impact on Milwaukee's ability to become a demand-driven system that can work with and positively affect the great economic development agenda of our region.

Six major themes emerged from analysis of the stakeholder interviews:

- Employers need to be engaged in a substantially more meaningful way.
- Employers need trained and ready-to-work individuals.
- The "system" needs to change
- Broader communication and coordination are essential
- Competition is problematic and needs to be addressed
- Leadership and accountability are vital

## Goals and Recommendations

Three major goals were identified:

### **Employers must become actively engaged in workforce development**

Employers are the driving force of our economy. They have the jobs. Engaging employers and coordinating workforce development efforts around employer needs will only enhance the overall opportunities for potential and incumbent workers in our region.

### **Milwaukee must build a well-trained and prepared regional workforce**

An employer-driven system with a primary focus on training and placing adults into jobs and assisting with advancement of workers will provide Milwaukee with the workforce it needs. Such a demand-driven system requires a transparent, cohesive continuum of workforce training and related services that employers and job seekers can understand and easily access.

### **Public and private investment is essential for success**

The public sector cannot be the only investor in workforce development. Private foundations, employers and other local stakeholders must work together to implement a coordinated workforce development agenda.

The following steps are recommended for achieving these goals:

#### **Define the System**

For Milwaukee to achieve a competitive workforce the workforce development landscape has to widen. Certainly the major regional players must continue to lead. But for Milwaukee to achieve a competitive workforce, the workforce development system must include far more entities.

#### **Create a Clear Leadership Structure**

There was almost unanimous agreement that there was a vacuum of leadership in local workforce development efforts. The report recommends looking at a tripartite leadership model: First, a team consisting of the PIC Board, DWD, and MATC; second, a local champion, a new voice to lead the charge for workforce excellence (Mayor Tom Barrett); and thirdly, an Employer Champion. In addition, this leadership team needs a lead facilitator whose job it would be to ensure that these three leadership elements communicate effectively among themselves as well as to their primary constituencies and work together for the greater good.

#### **Coordinate Services and Funding**

Effective coordination of services throughout the system is essential to realize the goal of a high quality regional workforce sustained by engaged employers and public and private investment in training. Coordination needs to occur within each Job Center, throughout the Job Center network, and throughout the broad workforce development system. Coordination of funding needs to occur within DWD and between leading state agencies and other public sector funding sources, as well as between public sector funding sources and private foundations. We recommend the leadership structure focus coordination in three ways.

#### **Collect and Disseminate Essential Information**

One of the major barriers to collaboration efforts is the lack of easily accessible, up-to-date information. The broader workforce development system needs such information on what the main actors provide and what employers need. This would lead to less duplication of services and stronger relationships. In addition, the main actors themselves would benefit from an understanding of what the broader workforce development system provides and how players work together. Finally, funders, employers, and the economic development community need to have available easily accessible, employer focused information. All need to know how the system works and the benefits of collaborating.

**Council on Workforce Investment  
March 16, 2006**

**Workforce Investment Act Statewide Activity Funds  
CRITERIA AND PROCESS FOR PROJECT FUNDING, REVISED**

Each year, the Department of Workforce Development (DWD) earmarks Governor's Reserve Workforce Investment Act (WIA) Statewide Activity funds for use by the Council on Workforce Investment (CWI). WIA law and U.S. Department of Labor guidance provide states and, by extension, the CWI, some flexibility in how these funds can be used. The DWD intends that the CWI will use this flexibility to support the Governor's "Grow Wisconsin" plans to create high-wage jobs and build a high-skilled workforce. The CWI is requested to consider and adopt revisions to the funding process it approved in December 2004. The proposed revisions are intended to:

1. strengthen the connection of projects to the CWI's strategic vision, mission and goals and Committee-specific objectives for advancing them;
2. clarify and improve the consistency and transparency of the process used to determine how funds will be used, including the roles of the CWI and DWD;
3. incorporate established efforts of the CWI; and
4. address concerns raised by the CWI as a whole during 2005 funding discussions and by the Executive Committee during follow-up discussions of process changes.

**Key Changes Proposed**

Attachment A provides a flow diagram to visually represent the proposed funding process. Attachment B provides a comparison of the CWI's existing process for project development and fund distribution and proposed revisions to that process. Key changes are as follows, with Attachment B page numbers noted for reference:

Page 3 --Funding Criteria. The Criteria for funding are expanded and more specific. In particular, they add:

- o CWI objectives, organized by the Committee that developed them. *(These objectives and related strategies and action steps are detailed in the 2005 Report to the Governor, Appendix A.)*
- o Regional or statewide approaches or best practices applicable across regions/state.
- o Quantifiable outcomes (regional metrics, system dashboard metrics, program-specific performance metrics)
- o Threshold (minimum) requirements, among them consistency with WDB and GROW grant plans; connections to Job Centers when job seekers, workers, or employers are served; and CWI funding recognition in public communications and documents.

Page 5 -- Timetable. The current policy's "open-ended" funding period is eliminated and a specific timeframe for developing projects and making funding recommendations (March-June) and developing grants (July-September) are incorporated to ensure funds are obligated in a timely manner and expended at the level expected by U.S. DOL. In addition, it will ensure time for the CWI to focus on its policy/oversight role.

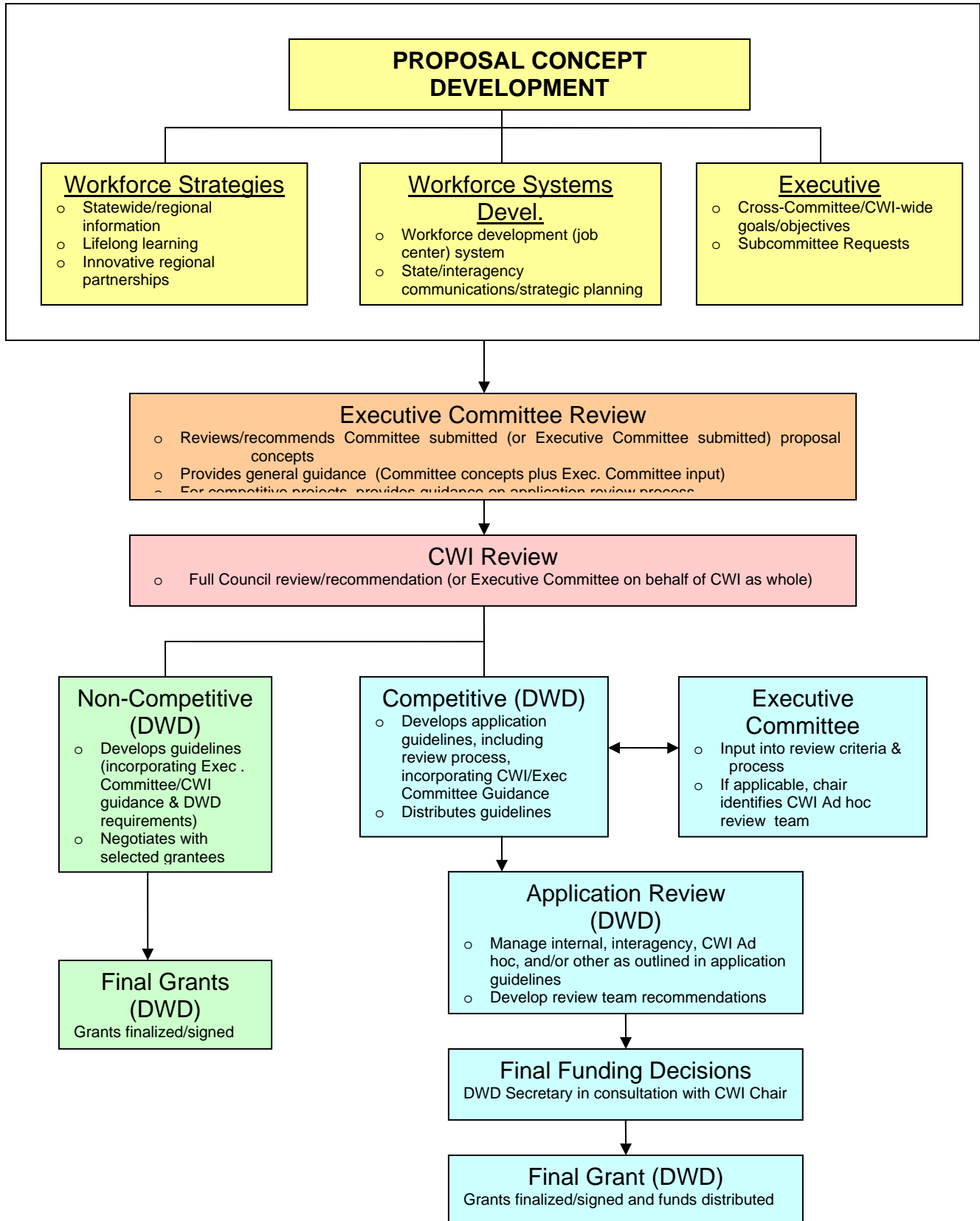
Page 6 -- Submission Process. The roles of the Committees in generating/submitting project concepts are clarified. This includes specifying that the Executive Committee (or its subcommittees) may generate proposal concepts for consideration.

Pages 6 & 7 -- Review Process. The general review process and flow from the CWI to DWD, as well as respective roles, have been clarified. This includes incorporating review by the CWI as a whole in the process. Also added are distinctions between non-competitive and competitive grant application reviews, including clarification of the roles for the CWI and DWD.

Page 7 -- Final Funding Approval. This is an addition to clarify that final funding decisions will be made by the DWD Secretary (as the legally accountable entity) in consultation with the CWI Chair.

- Attachments: A. Proposed Funding Process At a Glance (Flow Diagram)  
B. Comparison of 2004 and Proposed 2006 Funding Process

**CWI PROPOSED FUNDING PROCESS AT A GLANCE**



**Attachment B -- Side by Side Comparison of 2004 and Proposed 2006 CWI Funding Process**

	Approved December 2004	Proposed March 2006
<b>Funding Criteria</b>	<ol style="list-style-type: none"> <li>1. Proposals must demonstrate that the project will advance the Governor's Grow Wisconsin Plan, the CWI mission/vision, and related Committee goals.</li> <li>2. Proposals must have clear goals and measurable outcomes.</li> <li>3. Proposals should also leverage or maximize other available resources, at the national, state or local level.</li> <li>4. Proposals must comply with legislative requirements for use of WIA set-aside funds as follows in section B.</li> </ol>	<p><b>A. <u>Priorities for Use of Funds</u></b>            The CWI Statewide Activities funds are intended to support the CWI's strategic direction (mission, vision, goals) and advance the Governor's "Grow Wisconsin" plan. The following priorities reflect this direction, while recognizing WIA legislative requirements.</p> <ol style="list-style-type: none"> <li>1. Contributes to the achievement of the CWI's objectives, which in 2006 are the following (organized by CWI Committee responsible)               <ol style="list-style-type: none"> <li>a. Workforce Strategies Committee                   <ol style="list-style-type: none"> <li>i. Improve <u>statewide and regional information</u> (and methods for its ongoing collection and distribution) about workforce preparation and skill needs, employer demand, and industry/occupational growth, in forms readily usable in public and private decision-making.</li> <li>ii. Advance and enrich <u>lifelong learning</u> for Wisconsin citizens through innovative PK-16 education and employer-based training systems, with special attention to under-served and special needs populations.</li> <li>iii. Increase opportunities for <u>innovative regional partnerships</u> that support career opportunities and advancement in key occupational sectors.</li> </ol> </li> <li>b. Workforce Systems Development Committee                   <ol style="list-style-type: none"> <li>i. Increase flexibility and efficiency of <u>Wisconsin's workforce development (Job Center) system</u> and the quality of services to employers, job seekers, and employment and training partners.</li> <li>ii. Increase and improve <u>state and local interagency communications and strategic/program planning</u> to ensure alignment and effective implementation of CWI goals.</li> <li>iii. Increase collaborative use of <u>existing resources</u> and use of new <u>alternative resources</u>, including discretionary federal grants.</li> </ol> </li> </ol> </li> <li>2. Encompasses a regional or statewide approach and/or incorporates model/best practice strategies that can be applied across regions or the state as a whole.</li> <li>3. Leverages or maximizes other available resources (match) from the national, state or local level to the extent possible.</li> <li>4. Demonstrates quantifiable outcomes related to the regional/state economy (CWI Regional Metrics); the overall workforce investment</li> </ol>

		<p>system (CWI System Dashboard Metrics), and/or the wages, skill attainment or other measure of workforce success for job seekers or employers (program performance measures).</p> <p><u>B. Threshold Criteria</u></p> <p>All projects will be expected to meet several basic requirements to be considered for CWI funding. At minimum, project concepts must:</p> <ol style="list-style-type: none"> <li>1. Be an allowable activity under WIA (see Attachment A)</li> <li>2. Address all CWI priorities in A above, including at least one of the objectives in A.1.</li> <li>3. Have clear goals, objectives and measurable outcomes</li> <li>4. If regionally based, demonstrate consistency with WDB regional workforce development plans and GROW grant plans.</li> <li>5. Connect to area Job Centers if employers, current workers, and/or job seekers will be served.</li> <li>6. Incorporate CWI funding recognition in all public communications and grant supported documents.</li> </ol>
<p><b>Guidance for the use of WIA Set-Aside Funds</b></p>	<ol style="list-style-type: none"> <li>1. <u>WIA Legislation State Required Activities</u><sup>1</sup> <ol style="list-style-type: none"> <li>a. Evaluations of WIA activities, in coordination with local boards, for adults, dislocated workers and youth in order to promote continuous improvement</li> <li>b. Provide incentive grants to local areas for:               <ol style="list-style-type: none"> <li>i. Regional cooperation among local boards</li> <li>ii. Local coordination activities</li> <li>iii. Exemplary performance <sup>2</sup></li> </ol> </li> <li>c. Assisting in establishment and operation of the one-stop delivery system</li> <li>d. Additional assistance to local areas with high concentrations of eligible youth</li> </ol> </li> <li>1 <u>WIA Legislation State Optional Activities</u> <ol style="list-style-type: none"> <li>a. Capacity building and technical assistance to local areas, including staff development/training and development of "exemplary" program activities</li> <li>b. Research and demonstration projects</li> </ol> </li> </ol>	<p>Same -- these are WIA legislative requirements for fund use.</p>

<sup>1</sup> Does not include some required ongoing activities normally conducted by DWD/DWS, among them: rapid response activities; disseminating information on training providers, youth providers, and program costs; providing technical assistance to low-performing WDAs, operating a fiscal and management information system.

<sup>2</sup> Performance incentive awards currently provided under policy established by the CWI in 2002.

	<ul style="list-style-type: none"> <li>c. Innovative incumbent worker training programs, which may include an employer loan program to assist with skills upgrading and programs targeted to empowerment zones and enterprise communities</li> <li>d. Providing support to local areas for identification of eligible training providers</li> <li>e. Innovative programs for displaced homemakers and programs that increase number of people trained and placed in non-traditional employment</li> <li>f. Carrying out adult and dislocated worker employment/training activities as needed to assist local areas</li> <li>g. Statewide youth activities</li> </ul>	
<p><b>Timeline for CWI Project Development and Funding Decisions</b></p>	<ul style="list-style-type: none"> <li>1. Funds will be distributed on a first come, first served basis until all funds are dispersed.</li> <li>2. Committee requests must be submitted at least three (3) weeks prior to an Executive Committee meeting.</li> </ul>	<p>To ensure timely development, distribution and expenditure of the CWI's WIA funds, the CWI will establish a timetable that ensures final decisions on proposal concepts are completed prior to the beginning of the year in which funds are available (July 1) and final grants are distributed before the end of the first quarter of the funding year (September 30). The suggested timetable is as follows.</p> <p>A. <u>March - June:</u></p> <ul style="list-style-type: none"> <li>1. Committees develop project concept proposals, which may include Committee-sponsored general solicitation of project ideas for development.</li> <li>2. Executive Committee recommends project proposal concepts for consideration by full CWI. (See General Review Process, page 6, for exceptions.)</li> <li>3. CWI forwards project concepts for funding to DWD.</li> </ul> <p>B. <u>July - September</u></p> <ul style="list-style-type: none"> <li>1. For <u>competitive funds</u> DWD develops application guidelines, solicits proposals, completes review process, and makes funding awards.</li> <li>2. For <u>non-competitive funds</u>, DWD develops guidelines, negotiates with grantees, and makes grant awards.</li> <li>3. DWD reports to full Council on final awards.</li> </ul>
<p><b>Project/Project Concept Proposals</b></p>	<p><u>Project Proposals</u> Project submissions must provide a summary of no more than three (3) pages that includes:</p>	<p><u>Project Concept Proposal</u> The CWI will consider project <b>concept</b> proposals for consideration. Concept proposals will provide a basic summary/guidance for use of</p>

	<ol style="list-style-type: none"> <li>1. Brief summary of project concept, including key goals and objectives</li> <li>2. Identification of specific CWI mission statement(s) and Committee goals that the project will address and how the project will advance the mission and goals</li> <li>3. Geographic areas impacted (statewide versus regional)</li> <li>4. Estimated costs</li> <li>5. Recommendation on entities that might conduct the project and, if only one entity is recommended, the rationale for using the entity as a "sole source" provider. (Though competitive bids may be required, "sole source" bids may also be allowable in some situations. Proposals may suggest entities that should receive bid solicitations or provide justification for selecting a specific provider without a competitive bid process.)</li> </ol>	<p>the CWI Statewide Activity funds, including at minimum:</p> <ol style="list-style-type: none"> <li>1. Project title</li> <li>2. Amount of funds requested and period for which they are requested</li> <li>3. Purpose/priorities of the project, including identification of the key CWI objective(s) (in I.A.1. above) that will be addressed/advanced</li> <li>4. Key project goal(s), objectives, program activities, and key outcomes expected</li> <li>5. Key qualifying and administrative requirements, e.g., geographic areas to be impacted (statewide, GROW regions, WDAs, other), partnerships/collaborative efforts expected, match requirements, etc.</li> <li>6. Recommended process for fund distribution (e.g., competitive request for application, allocation to specific entity or entities, etc.), entities/organizations that should be eligible to conduct the project/receive funds, and if applicable, the rationale for using a single entity as a "sole source" provider/fund recipient.</li> </ol>
<b>Submission Process</b>	Committee requests must be submitted by Committees to the Executive Committee Chair and DWD Liaison staff.	Project concept proposals will be submitted through the CWI's standing committees - Workforce Strategies Committee, Workforce Systems Development Committee and Executive Committee. Executive Committee project concept proposals may come through its subcommittee structure or through the Executive Committee as a whole to address CWI goals/objectives that may cross Committee issue areas.
<b>General Review Process</b>	<ol style="list-style-type: none"> <li>1. The Executive Committee of the CWI will make recommendations on the use of the funds based on proposals submitted by the CWI Committees.</li> <li>2. Projects, and preliminary CWI staff review, will be reviewed at each Executive Committee meeting for which projects are submitted.</li> </ol>	<ol style="list-style-type: none"> <li>1. Project concept proposals will be submitted to the Executive Committee for full Executive Committee consideration/recommendation.</li> <li>2. Executive Committee recommendations will be brought to the full CWI for full CWI recommendation when possible. When time constraints or other issues preclude full CWI consideration, the Executive Committee will recommend proposal concepts for funding on behalf of the full CWI.</li> <li>3. Final CWI recommendations of project proposal concepts (from the CWI as a whole or from Executive Committee acting on behalf of the full CWI) will be transmitted to DWD for development and implementation.</li> </ol>

<b>Non Competitive Grant Applications</b>	Not addressed	Project concept proposals recommended by the CWI (Executive Committee) for non-competitive grants will be further developed by DWD staff and negotiated, as needed, with designated fund applicants into final grants. No further CWI action prior to grant finalization is expected, unless specifically requested by the CWI.
<b>Competitive Grant Applications</b>	Not addressed	<ol style="list-style-type: none"> <li>1. Project concept proposals recommended by the CWI (Executive Committee) for competitive funding will be expanded into project/grant application guidelines and distributed to appropriate entities by DWD on behalf of the CWI.</li> <li>2. DWD will develop a review process for each competitive application appropriate to the type of application/potential applicants. The proposed review process will be brought to the CWI Executive Committee for review and feedback. Types of reviews may include, but are not limited to, one or more of the following: <ol style="list-style-type: none"> <li>a. DWD staff review of complete application</li> <li>b. Interagency review of complete application</li> <li>c. CWI Ad Hoc Review Committee review of complete application</li> <li>d. Executive Committee review of applications addressing key issues of interest to the Executive Committee and/or key issues for review teams to consider in review.</li> </ol> </li> <li>3. CWI Ad Hoc Committee Review, if appropriate, will include CWI members suggested by the CWI chair. Members appointed must show no conflict of interest related to proposals to be reviewed.</li> </ol>
<b>Final Funding Approval</b>	Not Addressed	Final funding approval for CWI projects rest with the DWD Secretary in consultation with the CWI chair. The specific approval method is at the discretion of the DWD Secretary as the accountable administering agency, in consultation with the CWI Chair.
<b>Miscellaneous Provisions</b>	<ol style="list-style-type: none"> <li>1. There is no limit on costs of proposed projects</li> <li>2. Federal rules require that 70% of these funds be expended by the end of the program year (June 30, 2005).</li> <li>3. DWD will follow state procurement rules for granting of projects, which may at times require competitive bid process.</li> </ol>	DWD may impose additional administrative requirements depending on the nature of the project concept(s) the CWI ultimately recommends. These may include assurances/plans for fund expenditures to ensure 70% of funds are expended in the year they are allocated, administrative fund limitations, reporting requirements, etc.

### **Overview of Proposed Use of CWI WIA Statewide Activity Project Funds**

The Council on Workforce Investment (CWI) has \$422,550 in Program Year 2005 funds remaining for its projects and will have another \$500,000 available starting July 1, 2006 (from Program Year 2006 funds). The CWI will need to determine how these funds will be used in the near future. Determining fund distribution as soon as possible is particularly important if the CWI intends to announce any new grants at the Governor's Employment and Training Conference on May 18, 2006. The following proposes the general funding categories and the percent of funds/amounts to be made available to each category.

Category	Current (PY 04/PY 05)	PY 05 Funds (\$422,550 Available)		PY 06 Funds (\$500,000 Available)		Total Funds (\$1.5 Mil. PY 04-PY06)	
	\$\$	%	\$\$	%	\$\$	%	\$\$
GROW Grants	465,500	0	0	80%	400,000	57.7	865,500
New Project Solicitation	0	94.8	400,550	0	0	26.7	400,550
Adv. Manufacturing	0	0	0	20%	100,000	6.7	100,000
Studies <sup>3</sup>	69,950	0	0	0	0	4.7	69,950
WDB Projects							
o Baldrige Assessment	20,000	2.6	11,000	0	0	2.1	31,000
o Staff Credentialing	22,000	2.6	11,000	0	0	2.2	33,000

#### Project Concepts at a Glance

- **GROW Grants.** 80% of PY 06 funds would be reserved to expand/build upon current grants. Specific grant expansion goals/objectives and other relevant direction would be developed in consultation with the Workforce Strategies Committee, following reporting on current grant efforts. Grants would be competitive and developed to begin upon completion of the first GROW grants.
- **New Project Solicitations:** The CWI would use most remaining PY 05 funds for a general project solicitation focused on advancing Committee-specific objectives. The Project Solicitation would be distributed following CWI action on March 16; selected projects/grantees would be announced at the May Governor's Employment and Training Conference.
- **Advanced Manufacturing.** 20% of PY 06 funds would be reserved for the Strategies Committee to develop projects that contribute to skill training in manufacturing. Potential focus areas include (a) a comprehensive "wrap-around" initiative that incorporates various efforts (with special emphasis on attracting young people to manufacturing), (b) Manufacturing Skills Standards Certification, and/or (c) WTCS Advanced Manufacturing Solutions support. The project concept would be developed in spring, grant applications would be submitted during the summer, and final grants would be awarded by the end of September 2006.
- **WDB Project Continuation.** A small portion of PY 05 funds would be used for the following, starting July 1, 2006:
  - o Baldrige Assessment -- would provide funds for Baldrige Board Leadership Assessment for WDBs that did not complete one in the first round of grants and/or Job Center Assessments for those Boards that completed the Leadership Assessment.
  - o Staff Credentialing -- for WDBs to continue staff development through NAWDB certifications.

<sup>3</sup> Includes UWM Milwaukee Study and Southwest Wisconsin Technical College Study in PY 04 and PY 05 respectively.

*Draft*

**Council on Workforce Investment  
March 16, 2006**

**SPECIAL PROJECT SOLICITATION GUIDANCE  
and  
APPLICATION SUBMISSION REQUIREMENTS**

**Part I -- Special Project Solicitation Guidance**

The Council on Workforce Investment is soliciting proposal concepts directed to advancing Governor Doyle's plans to Grow Wisconsin and the CWI's strategic direction. This includes the CWI's mission to advise the Governor on preparing the workforce for the future, supporting the changing workplace, and ensuring state and regional success and its vision of providing *qualified workers for quality jobs* through an effective and agile workforce investment system that provides career-ladder opportunities resulting in a highly educated, skilled and motivated workforce for a vibrant, globally competitive economy, and an exceptional quality of life for Wisconsin's citizens. To advance its mission and vision, the CWI has established five goals:

- A. Identify existing and future regional workforce and skill needs.
- B. Support effective regional strategies to align the supply of qualified workers with emerging demand.
- C. Upgrade the demand to advance a high-wage, high-growth economy.
- D. Target resources to key growth industries in different regions of the state.
- E. Ensure a comprehensive, effective and accountable workforce development system to deliver the education and training services to achieve the vision.

The following provides guidance for entities interested in submitting proposal concepts to the CWI and the process the Department of Workforce Development, on behalf of the CWI, will follow in selecting and fully developing proposals for funding.

**Proposal Concept Objectives**

To further its mission, vision and goals, the CWI is making funds available under this project solicitation to advance three priority CWI objectives. Applicants for these special project funds must address at least one of these three objectives. The objectives, and related CWI strategies and action steps to advance them, are listed below. The CWI strategies and action steps are listed for information; while not required elements, applicants are encouraged to consider them when developing project concept applications.

1. Targeted Regional Priorities. Increase opportunities for innovative regional partnerships that support opportunities and advancement in key occupational sectors.

*Related Strategies:*

- a. Identify/pursue job creation methods and workforce education and training models to maximize career advancement opportunities in existing regional industry clusters.
- b. Identify, support and disseminate successful models of public/private cooperation for implementing industry-driven education and training models for both future and incumbent workers.
- c. Support multilateral regional networks/partnerships (of business, labor, education and economic development and workforce development agencies) for cultivating high-growth, high-wage industry occupations appropriate for each region.

*Related Action Steps:*

- Information and reports on "best practice" models of workplace learning centers and private sector driven incumbent worker training.

2. **Service Delivery System.** Increase flexibility and efficiency of Wisconsin's workforce development (Job Center) system and the quality of services to employers, job seekers and employment and training partners.

*Related Strategies:*

- a. Advise the Governor on a vision for Wisconsin's Job Center System.
- b. Establish a clear mission for workforce development areas and regional economic-driven workforce related activities.
- c. Develop high-level performance based scorecard on workforce system effectiveness.
- d. Provide guidance, identify needs, and recommend changes to meet the vision.

*Related Action Steps:*

- Recommendations on workforce system, including connecting workforce development areas to regional economic areas;
- Recommendations on measurable job center standards for delivery of services, with annual accountability to state;
- Recommendations on program metrics and means to reflect drive to continuously improve productivity.

3. **Coordination and Collaboration.** Increase and improve state and local interagency communications and strategic/program planning to ensure alignment and effective implementation of CWI goals.

*Related Strategies:*

- a. Establish consistent two-way state/local communication with WDB directors and seek input from Workforce Development Boards, Chief Local Elected Officials, and workforce system partners through forums, surveys, and other methods.
- b. Develop strategies for strengthening communications between technical colleges and WDBs.
- c. Identify strategic issues for accountability back to state.
- d. Develop high level performance-based scorecard on workforce system effectiveness.
- e. Guide state level planning measures and coordination focused on strategic issues.

*Related Action Steps:*

- Guidelines, technical assistance for local elected officials to solicit nominations to increase effectiveness and participation levels of workforce development boards
- Recommendations on regional planning using economic regions as part of plan requirements for all programs operated/managed by state;
- Recommendations on memorandum of understanding that establish coordination, referral, and infrastructure funding for all required one stop partners.

### **Eligible Applicants**

Entities eligible to apply for grant funds are workforce development boards, K-16 educational institutions, local governments, economic development entities, labor organizations, business associations, and private non-profit organizations (including community-based and faith-based organizations).

### **Funds Available and Grant Period**

\$400,550 in WIA statewide activity funds will be available under this grant program. The maximum grant amount will be for \$100,000. Approved grants will be for a period of one year, from July 1, 2006 to June 30, 2007.

### **Other Project Requirements**

1. **Consistency with WIA Legislation:** Projects must be an allowable statewide activity under WIA legislation (see Attachment B).
2. **Project Match:** Applicant organizations must provide at least 25% of project funds through cash or in-kind match. Match may be from federal, state, foundations, or other sources,

including program revenue, except where prohibited by WIA legislation (e.g., fees for WIA participant services, etc.)

3. Approach and Coordination: Projects should encompass a regional or statewide approach and/or incorporate "best practice" strategies. If regionally based, projects must demonstrate consistency with WDB plans and GROW grant plans. If direct services to youth, current workers, job seekers, or employers, services must be connected to Job Centers.
4. CWI Recognition. Approved projects must provide recognition to the CWI in all products and publicly disseminated information funded through CWI grant funds.

### **Application Submission Requirements and Review Process**

Interested organizations will be required to submit a project concept proposal of no more than five pages. The content requirements for this proposal are included in Attachment A. The project concept proposals are due no later than 4:00 p.m. on Friday, April 14, 2006. Proposal concepts may be mailed or emailed to:

Sue Gleason, CWI Liaison  
DWD/Division of Workforce Solutions, Office of Economic Initiatives  
PO Box 7972  
Madison, WI 53707-7972  
[Susan.gleason@dwd.state.wi.us](mailto:Susan.gleason@dwd.state.wi.us)

Submitted project concepts will be reviewed by an Ad Hoc Committee made up of DWD staff, other state agency staff identified through the State Interagency Team, and members of each of the three CWI standing committees selected by the CWI chair. CWI members will be those with no conflict of interest with respect to submitted applications. Ad Hoc Committee recommendations will be reviewed by the CWI Executive Committee on behalf of the full CWI. Final CWI Executive Committee recommendations will be reviewed and approved by the DWD Secretary in consultation with the CWI Chair. DWD will work with recommended applicants to finalize budgets and other elements of grants to ensure consistency with WIA, CWI and DWD requirements. Failure to reach agreement during this final development stage will result in disapproval of the application and reconsideration of other grant proposals by the CWI Chair and DWD Secretary.

Successful applicants will be announced at the Governor's Employment and Training Conference on May 18, 2006.

### **Resources**

The CWI has engaged in a number of activities to advance its objectives. Review of the following resources may assist interested applicants develop projects for CWI consideration. Resources listed below are available on the CWI web site home page, <http://www.wi-cwi.org/>.

- Council Meeting -- March 16 Meeting Materials: Draft Recommendations to the Governor on the Workforce System and Draft Ad Hoc Committee (Milwaukee Report) Recommendations
- Regional Metrics Benchmarking Initiative
- GROW Grants
- Inventory of Wisconsin's Workforce Education and Training
- Qualified Workers for Quality Jobs, 2005 Annual Report to Governor Jim Doyle

Other potentially useful information includes:

- CWI Workforce Strategies Committee and CWI Workforce Systems Development Committee meeting minutes -- <http://www.wi-cwi.org/committees/default.htm>.
- Workforce Development Boards -- <http://www.wi-cwi.org/links.htm>
- State Workforce Investment Act State Plan, Local Planning Guidelines and Job Center Standards are available at <http://dwd.wisconsin.gov/dwdwia/>

## Part II -- Project Solicitation Submission Requirements

Applicants interested in applying for CWI WIA Statewide Activity funds under this special solicitation must submit a concept proposal of no more than five pages that responds to the following information elements.

- A. Applicant Organization Information
  - 1. Applicant organization name and address
  - 2. Applicant organization contact name, title, phone and email address
- B. Project Basics
  - 1. Project Title
  - 2. Total Funding Requested
  - 3. Funding Period Requested
  - 4. Geographic area served or impacted (statewide or regional), including specific WDB and GROW regions if regionally based
- C. Project Purpose and Priorities
  - 1. What is the purpose of the project?
  - 2. What specific CWI objective(s) and related strategies will be addressed?
  - 3. How will the project advance this (these) objective(s)?
- D. Project Goals, Objectives, Activities, and Measurable Outcomes
  - 1. What are the key goals and objectives for the project?
  - 2. What are key activities that will be undertaken to achieve the goals and objectives above?
  - 3. What are the specific outcomes/results expected and how will they be measured?
- E. Coordination/Linkages
  - 1. If this is a regionally focused project, describe how it relates to the WDB and GROW plans for the region. Include a description of joint planning that has or is expected to occur in project development.
  - 2. If direct services to youth, job seekers, current workers, or employers are planned, describe how these services will be linked to area job centers.
  - 3. What other key partners are important to accomplishing project goals and objectives and what coordination efforts/linkages have occurred and/or are expected to occur with these partners?
- F. Match
  - Indicate the amount of match that will contribute to this project, the type of match (in-kind and/or cash), and the source of the match.
- G. Other
  - 1. Please describe other features of this project that you believe are particularly important and/or unique and that would help the CWI understand how it will advance the CWI's vision, goals and objectives and why it should be supported. For example, you may want to briefly describe the specific need your project addresses; best practices that will be tested and/or advanced; an industry approach, service, and/or relationships that will be advanced; or other similar features of the project plan, etc.
  - 2. If you have not had a CWI or WIA grant in the past, briefly describe what makes your organization capable of administering a CWI WIA grant and successfully meeting project expectations.

**WIA GOVERNOR'S FUNDS  
ALLOWABLE STATEWIDE EMPLOYMENT AND TRAINING ACTIVITIES  
[WIA, Section 134 (a)]**

Under WIA, funds reserved by the Governor for statewide activities may be used for both required and optional activities. The activities below summarize most of these activities. (See footnote for other required statewide activities supported with the Governor's statewide funds.)

1. State Required Activities<sup>4</sup>
  - b. Evaluations of WIA activities, in coordination with local boards, for adults, dislocated workers and youth in order to promote continuous improvement
  - c. Provide incentive grants to local areas for:
    - i. Regional cooperation among local boards
    - ii. Local coordination activities
    - iii. Exemplary performance<sup>5</sup>
  - d. Assisting in establishment and operation of the one-stop delivery system
  - e. Additional assistance to local areas with high concentrations of eligible youth
  
2. Optional Activities
  - a. Capacity building and technical assistance to local areas, including staff development/training and development of "exemplary" program activities
  - a. Research and demonstration projects
  - b. Innovative incumbent worker training programs, which may include an employer loan program to assist with skills upgrading and programs targeted to empowerment zones and enterprise communities
  - c. Providing support to local areas for identification of eligible training providers
  - d. Innovative programs for displaced homemakers and programs that increase number of people trained and placed in non-traditional employment
  - e. Carrying out adult and dislocated worker employment/training activities as needed to assist local areas
  - g. Statewide youth activities

---

<sup>4</sup> Does not include some required ongoing activities normally conducted by DWD/DWS, including: rapid response activities; disseminating information on training providers, youth providers, and program costs; providing technical assistance to low-performing WDAs, operating a fiscal and management information system.

<sup>5</sup> Performance incentive awards currently provided under policy established by the CWI in 2002.



**JIM DOYLE**  
**GOVERNOR**  
**STATE OF WISCONSIN**

---

February 15, 2006

Carey Appold  
Centers for Medicare and Medicaid Services  
Center for Medicaid and State Operations  
Disabled and Elderly Health Programs Group  
Mail Stop: S2-14-26  
7500 Security Blvd.  
Baltimore, MD 21244-1850

Dear Ms Appold:

In my letter dated November 30<sup>th</sup> sent in support of the Wisconsin Medicaid Infrastructure Grant (CFDA Number 11-P-92410/5-01) I indicated strong correspondence between proposed grant projects and the goals of my Grow Wisconsin economic development initiative. This letter is provided as an indication of my support of the "Pathways to Independence" strategic plan. Like Grow Wisconsin, the Pathways plan provides a road map to connect a wide array of available programs and resources available in order to develop a comprehensive employment system for all the state's citizens.

The six priorities and associated action strategies developed for the Pathways plan are consistent with many of the goals, objectives and approaches of my Grow Wisconsin initiative, and as such, the Pathways plan provides an excellent starting point for discussion and basis of collaboration among disability and workforce system stakeholders.

I wish to express my appreciation for the support your agency has provided and my optimism that the Pathways Plan, an important initiative in my comprehensive Grow Wisconsin agenda, will lead to creating 21<sup>st</sup> century jobs and an inclusive workforce to fill them.

Sincerely,

A handwritten signature in black ink that reads "Jim Doyle".

Jim Doyle  
Governor