

Workforce System Development Committee

Meeting Notice

**Thursday
July 28, 2005**

**11:00 a.m. - 2:00 p.m.
Wausau
Marathon County Job Center
364 Grand Avenue**

10:00 a.m. A tour of the facility will be provided: Sally Cutler, Director

11:00 a.m. Full Committee Meeting:

AGENDA

- 1. Approval of the June 3, 2005 Minutes - - For Action (Attachment)**
- 2. Status Report of Ad Hoc Committee: Thomas Burse**
- 3. Update on Previous Topics (Attachment)**
- 4. DWD Items on Job Center Service Standards and Outcomes Workgroup; Comprehensive and Satellite Workgroup; Financial Literacy and Credit Repair Counseling Update; W-2 Contracts: Bill Clingan**
- 5. Local and State Performance Information: Sally Cutler and Dianne Reynolds Working Lunch [Note: Lunch provided for Committee members/staff and presenters]**
- 6. Review and Discuss Action Steps: Joe Gilles (Attachment)**

For further information, contact Committee staff: Linda Williamson, telephone (608) 261-6394, E-mail: linda.williamson@dwd.state.wi.us

If you have other special needs such as assistance to access materials in an alternate format including large print, or you need an interpreter, please contact Gloria Kirchoff: gloria.kirchoff@dwd.state.wi.us, or call her at (608) 267-2191.

Agenda Item # 1

Draft Pending Approval COUNCIL ON WORKFORCE INVESTMENT

Workforce System Development Committee Madison June 3, 2005 MEETING MINUTES

Members Present:

Business Co-Chair: Joseph Gilles, CEO, Wausau Insurance, Wausau; *Non-Business Co-Chair:* Tina Koehn, VP of Administration, UMOS, Menomonee Falls; Thomas L. Burse, President, Buveck Consultants/Construction Managers, Milwaukee; Kathleen Hinze for Christopher A. Ruud, Executive Vice President, Ruud Lighting, Racine; Fredi Ellen Bove, for Secretary, Wisconsin Department of Health and Family Services; Donald L. Rouse, retired Vice President Corporate Operations, Kohl's Department Stores, Hartland; John Scocos, Secretary, Wisconsin Department of Veterans Affairs; Georgann Stinson, VP of Operations, General Converters & Assemblers, Racine; Conor Sabatino for Representative Zepnick. DWD Liaison Bill Clingan, Division Administrator.

Members Absent: Kathleen Drengler, Matthew Frank, Donald W. Layden, Jr.; Sally Peltz, David Vierthaler.

Committee Staff Present: Pamela O'Brien, Linda Williamson, Mary Pasholk.

Others Present at the Committee Meeting: Sheryl Billups and Theola Carter, CWI; Connie Colussy and Dianne Reynolds, Bureau of Workforce Programs, DWD; Sheila Knox, Job Service- Milwaukee; Diane Knutson, Job Service- WOW/Southeast; Anthony Hardie, Veterans Affairs; Teresa Barch, WWDA; Dave Wilson, Private Industry Council of Milwaukee County, Inc.; Christina Martinez, UMOS; Francisco Sanchez and Michael Mortell, WOW WDB; Bob Borreman, SWWDB; Sally Cutler, NCW WDB; Dale Hopkins, SCW WDB; Jerry Hanowski, WW WDB; Dick Best WCW WDB; Paul Linzmeyer, CWI Chair.

Agenda Item # 1

The motion to approve the minutes of April 22, 2005 was moved by Mr. Rouse, seconded by Ms. Koehn, and unanimously adopted.

Agenda Item # 2

Ms. Billups presented the Executive Committee's actions approving the proposals that the Committee reviewed at their March 4th and April 22nd meetings including the National Credentialing for Workforce Development Staff (\$22,000/\$2,000 per WDB); Workforce Development Board Baldrige Express Self-Assessment (\$27,500/\$2,500 per WDB); and Milwaukee Workforce Development Landscape (\$60,000). It was also announced that the Wisconsin Regional Partnership Program Guidelines have been issued.

Agenda Item # 3

Ms. Koehn introduced the proposed charge of the sub-committee. She stated that planning and strategizing among all of the active workforce partners to have a consistent vision, better coordination and collaboration and to address other issues would be most beneficial for the Milwaukee area. Mr. Gilles stressed the importance of having a status report for each Committee meeting, and making it inclusive. There was discussion based on Mr. Rouse's question about regional and workforce development area boundaries as to the impact on performance and funding issues.

Action: A motion was made by Mr. Rouse, seconded by Ms. Koehn, to approve the composition and charge of the *Ad Hoc* Committee. The motion was unanimously approved.

The composition of the *Ad Hoc* Committee is Georgann Stinson, Don Rouse, Thomas Burse, Josh Zepnick and Tina Koen as voting members and Bill Clingan, DWD Committee Liaison as a non-voting member.

Agenda Item # 4

Ms. Colussy summarized the timeline of the Workforce Investment Act State Plan 2005-07. She stated that the Plan addresses a system to be more demand driven including further emphasis on: career guidance to have customers understand high-growth and high-demand industries in their areas; business services which is a way to attach the employers with the customers; targeting those employers with higher wage jobs by informing the job seekers; requiring WDBs to spend at least 35% of their funds on training for high wage jobs; strengthening the workforce system that would be accomplished through the funding of Baldrige Self-Assessment and national credentialing for workforce development staff; Job Center classification system whereby DWD will only put resources into centers that meet the criteria for comprehensive and satellite centers. Ms. Colussy stated there will be two work groups that will develop the definitions of comprehensive and satellite and Job Center business service standards.

Ms. Koehn announced that UMOS received a National Pilot Grant to provide a major financial literacy project which would be complimentary to DWD's efforts. Mr. Gilles raised the issue of DWD providing clear rationale as to why they would have comprehensive versus satellite centers, rather than simply list a set of standards. He stressed the need to provide statewide guidance as to what kind of structure they ought to have in their areas along with the recognition of local nuances. The WDB Directors noted that area leaders have a large impact on the number and services provided in Job Centers, and therefore, were concerned about a state-wide list of criteria. Discussion also related to the availability of resources that in effect guide how many centers and the levels of services. Mr. Gilles stated that DWD needs to have a statewide strategic plan that actually has specific benchmarks to measure improvements of the "system." Mr. Linzmeyer added that the Technical College and University System Presidents need to discuss these issues with the CWI and the Governor. As the Chair of the Bay Area Workforce Development Board, he stressed the need for definitions and better guidance from the State (DWD/CWI) notwithstanding the complications of roles at the local level. Ms. Koehn asked if the Committee could work in cooperation with the workgroups to develop the standards, but Bill Clingan did not know if that would be feasible. Mr. Burse stressed how vital it is to have this process legitimized, and have the proper stakeholders involved, in order to be able to defend the outcomes of these work groups given that their products would have significant implications statewide.

Agenda Item # 5

Ms. Reynolds circulated a chart on the organization of the DWD Bureau of Workforce Programs where the Local Program Liaisons (LPLs) are housed and a map of the WDAs they cover. She summarized the LPL's role that includes: work directly with the Workforce Development Boards to ensure compliance with programs and procedures and quality services are being provided; review local plans; along with policy staff, data validation to ensure case files are in order, help implement corrective action plans; fiscal monitoring along with other DWD staff; attend local WDB and case management meetings; recertification of WDBs with policy staff; monitor performance levels locally; formal annual on-site monitoring plus a desk review; and two dislocated worker programs. In response to a question on performance measures, Ms. Reynolds stated that negotiations at the State got approved by DOL and those will now be addressed for each WDA performance. Mr. Gilles asked if any of these monitoring tools could be part of the metrics project by Joel Rogers and used for CWI efforts.

Agenda Item # 6

Mr. Francisco Sanchez stated that most of the WDAs have business services, and that WOW started in 1994 with the DOL funded project in conjunction with Milwaukee and Kenosha. Mr. Michael Mortell discussed in detail their program, and circulated a Business Services packet that is provided to WOW's employers. It identifies services that they could provide with a fee-for-services charge which has allowed the funding of other services beyond the program silos. WOW's Business Representatives are primarily from the private sector so they are well able to assist employer on how to hire, train, retain and expand their businesses. He stated this is vital to speak to the private sector without the jargon of government or programs. The employers also participate with WDB planning and providing information for grant

applications. WOW partners with local newspapers that publish specialty job fair events and other partnership examples. Finally, they presented information on the pilot project to contract with a staffing company for successful placement activities.

Agenda Item # 7

Mr. Gilles stated that the Committee's revised work plan was reflected in the Objectives and Strategies chart, and that the list of draft next steps would be discussed further as part of "Action Steps." He stated that the themes came from review of the minutes and public input summaries. There was discussion about metrics, the process for the allocation of funds and infrastructure costs. Mr. Rouse, Ms. Stinson seconded, made a motion to approve the document that was unanimously adopted.

The next meeting's agenda would include:

Discussion of next steps

Ad Hoc Committee Report

Background information will be provided on the CWI State Interagency (staff) Team.

The meeting adjourned at 11:55 a.m.

Agenda Item # 3

Update on Previous Topics July 28, 2005

State Interagency Team

The CWI Executive Committee recommended the establishment of a staff State Interagency Team (SIT) to help advance CWI recommendations across state agencies. Chaired by JoAnna Richard, DWD Executive Assistant, and staffed by Sue Gleason, CWI Liaison, it is comprised of the Executive Assistants of each of the state agencies on the CWI. They meet quarterly, and their charge includes:

- To develop and plan collaborative workforce related initiatives as appropriate in response to suggestions from the CWI
- To prepare presentations as appropriate for the CWI
- To monitor progress on collaborative initiatives

To date, the SIT has assisted the CWI to implement its recommendations by coordinating information collection efforts within their agencies for the *Inventory* and assisting in formulating recommendations to the Governor on funding youth apprenticeship programs. The SIT is expected to assist the CWI and DWD in advancing the Governor's and CWI's vision for "qualified workers for quality jobs." An immediate activity is to assist in review of the GROW Region-by-Region grants. In the coming months it is also expected to be involved in two key activities. These are to (1) advise the CWI and DWD in developing transparent systems with better data and analysis on employer and worker needs and system performance, and (2) integration and reform to increase efficiencies and maximize resources. The later may include several specific activities related to organized labor involvement by region and sector; strategic targeting of special needs, opportunities and resources; promotion of career ladders and life-long skill building; and, strengthened regional education, economic and workforce development to promote skills training and work opportunities that meet regional needs. As key leaders within state agencies, SIT members are likely to assist with implementing policy responses within their agencies and, where appropriate, with their local partner agencies and partner programs. Implementation may take a variety of forms- - from development of common language in program guidelines and/or request for proposals across agencies, to formation of interagency design teams, to interagency review of grant submissions, to joint funding of youth programs. The specifics of the collaborative efforts will be dependent on the specific policy responses and/or activities developed by the CWI.

Update on Projects Endorsed by the Committee

The CWI has approved three projects that will be contracted through the Workforce Development Boards (GROW, staff credentialing and Baldrige Express survey). DWD/DWS has established an integrated contracting process to streamline and reduce cycle time in the contracting process. Other activities related to projects specific to the Workforce System Development Committee are summarized below:

1. Workforce Development System Staff Credentialing

Each WDB will receive \$2,000 toward continuously improving the quality of Job Center services. DWS/BWP is working on the final draft for a packet that will go out to the field regarding the grant. This project will help pay for Job Center direct service staff and their supervisors to earn a national credential certifying achievement of specified standards/levels of education, experience, competency and ethical behavior using the National Association of Workforce Development Professionals certification program. This project will contribute to continuously improving the effectiveness of the Job Center system and the quality of customer services.

2. Workforce Development Board Baldrige Express Self-Assessment

Each WDA will receive \$2,500 to use this tool for assessing WDB leadership effectiveness and identifying key opportunities for improvement using the National Baldrige Criteria for Performance Excellence. The survey is administered by Wisconsin Forward Award, Inc. (WFA), the organization that operates Wisconsin's Baldrige-based performance excellence management education and award program. The survey provides WDBs a consistent method for assessing, measuring and continuously improving their organizational effectiveness, including leadership effectiveness.

DWD/DWS has identified members of a small work group to plan implementation rollout. The workgroup is comprised of DWS staff, WDB Executive Directors and staff, and WFA, Inc. staff. All members of the workgroup have WFA/Baldrige Examiner experience. The workgroup will be focusing on three areas: defining general guidelines for survey participants, revising survey questions to increase their relevancy to WDBs, and developing an orientation session for participating WDBs. The workgroup is expected to meet for the first time in August, is expected to have implementation instructions available in September, with plans for an orientation before the end of October.

Agenda Item # 6

Action Steps [From Appendix A, Objectives D, E & F of the draft CWI Report to the Governor] As approved from the June 3, 2005 Committee meeting

Service Delivery System

Make recommendations on the redesign the workforce system, including connecting Workforce Development Areas to regional economic development areas.

Make recommendations on Job Center standards that are measurable for the delivery of services with annual accountability back to the State.

Review program metrics and who owns them, and identify a means to reflect a drive to continuously improving productivity.

Office of Economic Advisors (OEI) added: Oversee/monitor staff credentialing system project implementation.

Coordination and Collaboration

Develop guidelines and provide technical assistance that allows sufficient time for the Chief Local Elected Officials to solicit nominations in order to increase the effectiveness and participation levels of Workforce Development Boards (WDBs).

Develop recommendations on regional planning among WDBs using economic regions (including metropolitan statistical areas) as part of a plan requirement for all programs operated/managed by the State.

Develop recommendations on enforcing the WDBs completion of all elements of the required WIA Memorandum of Understanding that establishes coordination, referral, and infrastructure funding for all required One-Stop partners (with funding contingent on meeting requirements).

OEI added: Oversee/monitor Baldrige Express and Milwaukee Landscape project implementation.

Maximizing Resources

Develop a State formula and process to dispense funds for the One-Stop infrastructure costs based on a common definition for how funds may be spent with specific outcomes.

Establish ways to ensure funds directed toward a sustainable One-Stop infrastructure are consistently accountable to the State, including WDB annual metrics reports and identification of continuous improvement steps with benchmarks for success.

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.

COUNCIL ON WORKFORCE INVESTMENT Strategic Direction for 2005 Through 2006

OUR MISSION

The CWI provides strategic leadership to Wisconsin's workforce investment system by advising the Governor on:

- ❖ Preparing the workforce for the future
- ❖ Supporting the changing workplace, and
- ❖ Ensuring state and regional success.

OUR VISION

Wisconsin invests in its people to provide *QUALIFIED WORKERS FOR QUALITY JOBS*, delivering these investments 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.

OUR GOALS

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

Objectives

Strategies

Action Steps

Objective A- Workforce Information

Improved statewide and regional information (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. (*Workforce Strategies Committee*)

Strategy 1: Identify skill gaps facing current employers and workers in established industries/occupations.

Strategy 2: Identify additional data needs at the regional level to assist in economic development, education and workforce planning.

Strategy 3: Develop techniques and mechanisms to quickly identify state and regional opportunities.

Strategy 4: Develop ways to communicate new opportunities in order to encourage well educated and highly skilled workers, particularly those trained in Wisconsin, to remain in Wisconsin.

- Skill gap survey and demonstration of federal, state, other electronic tools.
- Identify electronic resources for identifying skill gaps, industry needs, and other information (in real time or as up-to-date as possible).

<i>Objectives</i>	<i>Strategies</i>	<i>Action Steps</i>
<p>Objective B - Workforce Preparation and Support</p> <p>Advance and enrich lifelong learning for Wisconsin citizens through innovative PK-16 education and employer-based training systems, with special attention to under-served and special-needs populations. (<i>Workforce Strategies Committee</i>)</p>	<p>Strategy 1: Maximize the development, effectiveness, and use of distance education technology.</p> <p>Strategy 2: Provide for a workforce preparation system that is more flexible and responsive to economic needs.</p> <p>Strategy 3: Transition to a career development system that is transparent, accessible and has the capacity to meet the needs of a diverse citizenry and workforce.</p> <p>Strategy 4: Strengthen access and articulation to post-secondary education and work, such as recommended in the COBE (Committee on Baccalaureate Expansion) Report.</p>	<ul style="list-style-type: none"> ○ Collect information and report on trends, current use, and demand for distance learning spanning K-adult education and make recommendations on investment. ○ Identify and develop report on existing flexible education/training options in Wisconsin Technical College System. ○ Collect information and report on effectiveness of various youth programs. ○ Scan and report on innovative career development systems. ○ Explore and report on feasibility of convening a Career Education "Summit" to reenergize the state's commitment to career education. ○ Monitor and report on COBE implementation activities/liaison with implementation committee. ○ Collect information/report on Carl Perkins and educational options and trends in funding.
<p>Objective C - Targeted Regional Priorities</p> <p>Increased opportunities for innovative regional partnerships that support career opportunities and advancement in key occupational sectors. (<i>Workforce Strategies Committee</i>)</p>	<p>Strategy 1: Identify/pursue job creation methods and workforce education and training models to maximize career advancement opportunities in existing regional industry sectors.</p> <p>Strategy 2: Identify, support and disseminate successful models of public-private cooperation for implementing industry-driven education and training for both future and incumbent workers.</p> <p>Strategy 3: 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 to each region.</p>	<ul style="list-style-type: none"> ○ Gather information and report on "workplace learning centers." ○ Gather information and report on "best practices" in private sector driven incumbent worker training. ○ Clarify and differentiate among alternative ways of defining "region" for workforce development purposes. ○ Oversee/monitor GROW Region by Region project implementation.

<i>Objectives</i>	<i>Strategies</i>	<i>Action Steps</i>
<p>Objective D - Service Delivery System</p> <p>Increase flexibility and efficiency of Wisconsin's workforce development (Job Center) and the quality of services to employers, job seekers and employment and training partners. (<i>Workforce System Development Committee</i>)</p>	<p>Strategy 1: Advise the Governor on a vision for Wisconsin's Job Center system.</p> <p>Strategy 2: Establish a clear mission for workforce development areas and regional economic-driven workforce related activities.</p> <p>Strategy 3: Develop high-level performance based scorecard on workforce system effectiveness.</p> <p>Strategy 4: Provide guidance, identify needs and changes to meet vision.</p>	<ul style="list-style-type: none"> ○ Make recommendations on the redesign of the workforce system, including connecting workforce development areas to regional economic areas. ○ Make recommendations on Job Center standards that are measurable for the delivery of services with annual accountability back to the State. ○ Review program metrics and who owns them and identify a means to reflect a drive to continuously improving productivity. ○ Oversee/monitor staff credentialing system project implementation.
<p>Objective E - Coordination and Collaboration</p> <p>Increased and improved state and local interagency communications and strategic/program planning to ensure alignment and effective implementation of CWI goals. (<i>Workforce System Development Committee</i>)</p>	<p>Strategy 1: 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.</p> <p>Strategy 2: Develop strategies for strengthening communications between technical colleges and WDBs.</p> <p>Strategy 3: Identify strategic issues for accountability back to state.</p> <p>Strategy 4: Develop high level performance-based scorecard on workforce system effectiveness.</p> <p>Strategy 5: Guide state level planning measures and coordination focused on strategic issues</p>	<ul style="list-style-type: none"> ○ Develop guidelines and provide technical assistance that allows sufficient time for Chief Local Elected Official to solicit nominations in order to increase effectiveness and participation levels of Workforce Development Boards. ○ Develop recommendations on regional planning among WDBs using economic regions (including metropolitan statistical areas) as part of a plan requirement for all programs operated/managed by the State. ○ Develop recommendations on enforcing WDBs completion of all elements of required WIA Memorandum of Understanding that establishes coordination, referral, and infrastructure funding for all required one-stop partners (with fund allocation contingent on meeting requirements). ○ Oversee/monitor Baldrige Express project implementation. ○ Oversee/monitor Milwaukee Landscape project implementation.

<i>Objectives</i>	<i>Strategies</i>	<i>Action Steps</i>
<p>Objective F - Maximizing Resources Increased collaborative use of existing resources and use of new alternative funding resources, including discretionary federal grants. <i>(Workforce Systems Development Committee)</i></p>	<p>Strategy 1: Disseminate best practices for maximizing resources.</p> <p>Strategy 2: Identify "road blocks" from surveys and recommend strategies to address them.</p> <p>Strategy 3: Review performance of WIA and target funding for performance awards, technical assistance and training.</p> <p>Strategy 4: Establish metrics to measure the value of funds for infrastructure system support and workforce program gaps.</p> <p>Strategy 5: Assess how to effectively infuse funds into the system.</p> <p>Strategy 6: Explore foundation and business entities.</p> <p>Strategy 7: Improve collaborative approaches for grant writing.</p> <p>Strategy 8: Target resources to key areas.</p>	<ul style="list-style-type: none"> ○ Develop a state formula and process to dispense funds for One-Stop infrastructure costs based on a common definition for how funds may be spent with specific outcomes. ○ Establish ways to ensure funds directed toward a sustainable One-Stop infrastructure are consistently accountable to the State, including WDB annual metrics reports and identification of continuous improvement steps with benchmarks for success. ○ 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.