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Council on Workforce Investment

Date: April 29, 2005
To: Executive Committee Members
From: Sue Gleason and Sheryl Billups
Subject: **CWI Executive Committee Teleconference -- Monday, May 9, 1:00 to 2:30 p.m.**

Attached are the materials for the May 9 CWI Executive Committee teleconference meeting. The package includes the following:

- Agenda (Page 2)
- Minutes of January 21, 2005 Meeting (Page 3)
- Draft Summaries of CWI Project Proposals
 - Wisconsin Regional Partnership Program (Page 6)
 - National Credentialing for Workforce Development Staff (Page 8)
 - Workforce Development Board Baldrige Express Self-Assessment (Page 11)
 - Milwaukee's Workforce Development Landscape (Page 14)
- CWI Support Letters
 - Support letter for UW/WTCS Committee on Baccalaureate Expansion (Page 16)
 - Support letter for Carl Perkins Vocational Education Act and Adult Family Literacy (Page 17)
 - Support letter for expanding Youth Apprenticeship (Page 18)
- Draft Outline of Report to Governor (Page 19)

A summary of the WIA Two-Year Plan is in development and will be sent to you via email next week. In the meantime, you may want to review the following two items, which are posted on the DWD web page.

- Summary of the March WIA Forums, held to gather system input on development of the WIA Two Year Plan -- http://dwd.wisconsin.gov/dwdwia/forum_notes.htm
- Draft WIA Two Year Plan -- http://dwd.wisconsin.gov/dwdwia/PDF/wia_state_plan.pdf

To access this meeting:

Participants **outside of the Madison calling area** should dial the toll free number, **888-677-9189**, and, when prompted, enter conference code **2629#**. Be sure to enter the pound (#) key after the 4-digit number. Those **within the Madison calling area** should dial the local number, **(608) 316-0022**, and when prompted, enter **2629#**. If you have problems getting connected, call Wisline's Helpdesk at 1-800-442-4614 (in Madison or toll free).

Interested parties can attend the meeting in person at the State Labor Building (GEF 1), Room A415. All visitors to the State Labor Building must use the main entrance at 201 East Washington Avenue; this entrance is handicap accessible. Please stop and register at the customer assistance desk in the lobby.

Meeting materials are posted on the CWI web site at <http://www.wi-cwi.org/>. For questions about the agenda, contact Sue Gleason, Department of Workforce Development, Division of Workforce Solutions by phone at 608-266-0522 or by email at susan.gleason@dwd.state.wi.us. If you have special needs such as an interpreter or written materials in an alternative format, contact Gloria Kirchoff at (608) 267-2191 or email Gloria.Kirchoff@dwd.state.wi.us. (Text phone users may call the Wisconsin Telecommunications Relay System at 711 to request assistance.)

COUNCIL ON WORKFORCE INVESTMENT

EXECUTIVE COMMITTEE TELECONFERENCE

201 East Washington Ave. -- Madison, WI
GEF I, Room A 415

Monday, May 9, 2005
1:00 - 2:30 p.m.

AGENDA

- I. Call to Order and Minutes of January 21, 2005 Meeting (**For Action**)
- II. CWI Project Proposals (**For Action**)
 - A. Regional Partnerships Program
 - B. Workforce Development Staff Competency Credentialing System
 - C. WDB Baldrige Express Assessment
 - D. Milwaukee Workforce Development Landscape¹
- III. Committee Reports
 - A. Executive Committee Sub-committee Reports (*For Information*)
 - i. Dislocated Worker Sub-committee
 - B. Workforce Strategies Committee Report (**For Action**)
 - i. Support Letter for COBE (UW/WTCS Committee on Baccalaureate Expansion)
 - ii. Support Letter for Carl Perkins Vocational Education Act and Adult Family Literacy
 - iii. Support letter for expanding Youth Apprenticeship in Health Services
 - C. Workforce System Development Committee Report
- IV. WIA Two Year Plan -- Draft Summary for Review and Comment (**For Action**)
- V. CWI Report to the Governor for June 3rd Meeting (*For Discussion*)
 - A. Status of Committee Work Plans/Refining Objectives and Strategies
 - B. Other Report Content Suggestions
- VI. Liaison's Report
- VII. Adjourn

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¹ If recommended by the CWI Executive Committee and approved by DWD, State of Wisconsin procurement processes will be followed.

COUNCIL ON WORKFORCE INVESTMENT MEETING SUMMARY

(Draft Pending Approval)

**Executive Committee Meeting
Madison, WI
January 21, 2005**

Members Present: Paul Linzmeyer (Chair, by phone), Joel Rogers (Vice Chair), Roberta Gassman, Doug Moquin, Jane Svennevig (by phone), Joan Wilk (by phone), Sally Peltz (by phone), Barbara Fleisner, Lee Rasch (by phone), Joe Gilles, Tina Koehn

Members Absent: Dean Welch

CWI Staff Present: Sue Gleason, Sheryl Billups

Others Present: Jamie Wall (Dept. of Commerce); Connie Colussy, Dianne Reynolds (DWD/DWS); Dale Hopkins (South Central WDB); Beth Norris (Southeast WI WDB); Mike Mortell, Don Rouse (WOW WDB); Dave Wilson (Milwaukee PIC, by phone)

Key Issues/Discussion

I. Call to Order/Minutes of Last Meeting

Joel Rogers (Vice Chair) called the meeting to order at approximately 10:35 a.m.

Action: Joe Gilles moved approval of the November 18, 2004 Committee minutes; Roberta Gassman seconded the motion and it passed unanimously.

II. Committee Reports

A. Committee Merger Meeting

Rogers reported on the January 19 meeting to discuss merger of the Current Workforce and Emerging Opportunities Committees. Highlights of the report included the following:

- Representatives of the two Committees agreed to merge; the new Committee will have two co-chairs (Dean Welch and Lee Rasch); its name will be the Workforce Investment Committee. The two Committees will meet as one Workforce Investment Committee on March 4, in conjunction with the CWI meeting.
- The Committee representatives agreed on several priorities for the new Workforce Investment Committee, reflecting activities of each of the previous Committees.
 - Access to the public education and training system
 - Regional partnerships with business around key sectors
 - Improved information systems
 - Quick response to emerging/new opportunities, including entrepreneurship

Rogers concluded by noting that participants expect that the merged Committee will meet less often as whole (at CWI meetings only) and that there will be subcommittees or task forces, which will be self-managed to the extent possible.

Lee Rasch added that representatives of both Committees agreed that work on incumbent worker strategies should continue, while Jane Svennevig noted that the group also began discussion of deadlines for work activities. Doug Moquin raised questions about how the CWI's activities aligned with the state's overall goals -- the "bigger picture". In response, Gassman referenced Grow Wisconsin's "invest in people" goals. She noted that metrics is a focus of Grow WI that the CWI is working on and can develop recommendations for the Governor/DWD to consider.

B. Workforce Design Committee

Joe Gilles reported that the Committee had released results from the survey of chief local elected officials and are in process of finishing surveys to Workforce Development Board chairs and executive Directors. The next meeting is on February 7 where results of the surveys will be reviewed. Gilles also noted that Bill Clingan, Administrator of Division of Workforce Solutions, will be working with the Committee.

III. WIA Plan Modification

Sue Gleason provided a brief review of the WIA Plan modification and the review/comment process that had concluded in December. In response to a question from Gilles, staff noted that DWD is in contact with U.S. Department of Labor (DOL) on a regular basis regarding the plan modification and other issues. Rogers reminded members of earlier discussions about using the WIA five-year plan to help coordinate planning across programs. Gassman explained that U.S. DOL is requiring a new two year plan by the end of June, that planning guidelines have not yet been distributed, and that strategy and decisions rests with DWD, but the CWI can provide input.

Action: Joe Gilles moved to support the WIA Plan Modification, Moquin seconded the motion, and the motion passed unanimously.

IV. CWI Project Proposal

Gleason reviewed the funding available to the CWI for projects to support Grow Wisconsin (\$500,000 in WIA set-aside funds) and walked through the project ideas presented in the paper prepared for the meeting. These were ideas developed by staff based on issues discussed with Committees. Gleason noted that she had also received several unsolicited proposals -- one from WAJTE and two from WDBs. Paul Linzmeyer explained that the purpose of bringing the ideas to the Committee was to get input into the direction/type of proposal from which staff can more fully develop and solicit proposals.

The Committee discussed the proposals at length, with special focus on the proposal to develop regional workforce development/economic development partnerships. Questions about this proposal related to its function (dialogue group or action group), the relationship between the partnership group and the second project proposal to identify skill gaps, and who would be the "driver" of the group.

- Gleason explained that the partnership group could/would function as both a dialogue and action group.
- Gassman suggested that the partnership group and skills gaps projects were linked and that the skills gaps study should be first, followed by development of the regional partnerships to implement. Linzmeyer disagreed, explaining that the regional partnerships need to be established to set the foundation for regional support, dollars and action.
- Moquin raised questions about what group would be designated to take the lead to get the partnership together and keep it moving, noting that partnerships needed clear goals and a clear structure to

succeed. Rogers indicated his preference for keeping the question open. Linzmeyer suggested putting out a Request for Proposals that allowed people to be creative and focus on system changing results.

In related discussion, Committee members indicated that proposals should build on each other and should not duplicate what is (or should be) happening already. With respect to the partnership proposal, members also indicated that enough funding (including match) needed to be provided to make a difference and partnership projects should be considered start-ups and not demonstrations. Committee members also noted that economic/workforce development partnership building efforts could occur in a few regional areas and that it would be necessary to have a clear understanding of what regions were being addressed. With respect to the skill gaps proposal, Gassman indicated that staff should be able to complete the first part and it should not be funded with CWI funds. Members noted that the skill gap study would impact statewide.

Committee members also discussed the fourth proposal for training and staff development, suggesting that the Workforce System Design Committee should discuss this before taking further action. Gilles requested that the Committee have criteria for approving funds available.

Action:

- Gilles moved to have staff pursue the first proposal to promote regional workforce/economic development partnerships. The motion was seconded by Svennevig and passed unanimously.
- Svennevig moved to have staff pursue Part II of the skill gaps study. Gilles seconded the motion and it passed unanimously

V. Metrics

Gleason reviewed the background paper on metrics developed by staff, noting that a key question is whether the CWI is interested in workforce development system measures or state economic measures as a whole. Rogers noted that the "Blueprint" drafted by six other states with support from the U.S. DOL missed half the story, a comment supported by Gilles. Rogers indicated that COWS would continue to work with the Office of Economic Advisors on metrics. Gassman noted that the Interagency Team would need to buy into the measures and could provide input.

Request: Rogers requested a full copy of the "Blueprint" report.

VI. CWI Priorities for 2005

Gleason distributed proposed issues for each CWI meeting in the coming year. This will include presentations on workforce development programs, starting with the Dislocated Worker program in March.

Moquin noted that he was attending the annual meeting of the National Association of Workforce Boards on March 4 and wanted to know if the CWI has any positions on legislation or other issues that he could discuss at the meeting. This generated discussion about the need for the CWI to have a communication strategy (e.g., talking points that CWI members could use to champion CWI issues). Barbara Fleisner noted that Jane Svennevig is presenting at the upcoming Economic Development Conference and staff have worked with her to develop her presentation.

Rogers noted that Svennevig is leaving the CWI and acknowledged her contribution. He requested that staff develop a thank-you letter from the Chair and Vice Chair.

There being no further business, the meeting was adjourned.

For Agenda Item II. A.

Draft Summary of Wisconsin Regional Partnership Program

- **For Review and Approval by the CWI Executive Committee on May 9th, 2005**
- **Detailed grant guidelines will be released by DWD by May 31st, 2005**
- **New key decision/recommendations in BLUE BOLD**

I. Purpose and Priorities

A key mission of the CWI is to encourage and support regional partnerships of business, labor, economic and workforce development, and education to increase regional collaboration and competitiveness. The priority for this grant program is **on workforce investment related activities**. Priorities for funding are:

- A. *The development or expansion of sustainable regional **partnerships** that will identify creative solutions to regional, or targeted industry, workforce challenges, **AND***
- B. *The development or expansion of an integrated regional economic and workforce development **plan** that will identify/assess key regional, or targeted industry, workforce needs related to regional economic goals, **OR***
- C. *If a partnership and plan are already in place, the development and **implementation of system building activities**, including identification of regional skill needs to advance regional plan goals.*

II. Program Activities

- A. **Proposal Options.** Proposal can be either for Comprehensive Regional Partnership (CRP) or a Targeted Industry Regional Partnership (TIRP).
 - i) **A CRP focus** would have a broad regional focus and may involve a wide range of economic growth issues, could be a new partnership or augment existing regional efforts, but would still require a primary focus on developing the workforce.
 - ii) **A TIRP** would have a more limited scope to address just one key regional industry, possibly augmenting existing industry cluster efforts, but would still require a primary focus on developing the workforce.
- B. **Program Activities.** The Partnership could be involved in several activities and programs to enhance economic competitiveness of their region from the workforce perspective. A list of possible activities will be included in the guidelines but creative solutions to workforce and related economic growth challenges will be encouraged.

III. Funding Availability and Timeframe

On behalf of the CWI, the DWD issue grant application guidelines to fund **UP TO \$400,000 DOLLARS** for regional partnership grant applications that best meet the requirements and spirit of the grant priorities. **THE TIMEFRAME** is:

- May 31, 2005 - Grant guidelines issued
- July 29 - Grant applications due
- August 31 - Grant awards announced
- Sept. date tbd - Partnership Teams "Institute" convened
- Sept. 30 - Grant period begins and runs for 12 months

IV. Qualifications Requirements

- A. **Definition of the region.** Regions must meet both population (at least 500,000) **and** number of counties (minimum of 4) thresholds, and must contain whole counties and whole workforce development boards.
- B. **Formation of the Partnership.** A partnership must be established that is comprised of decision-makers in key business sectors, key labor organizations, workforce development boards, economic development corporations/chambers, technical college districts, and UW campuses. Partnerships will be encouraged to include additional organizations that will be listed in the grant guidelines.
- C. **Administration of the Grant.** Workforce Development Boards will be the presumptive fiscal agents since this grant funding is from the federal Workforce Investment Act. If multiple WDBs are involved in a partnership, a local decision will be necessary to determine which one will serve as the fiscal agent. Shared partnership leadership among other lead organizations is strongly encouraged.
- D. **Program Institute.** Successful applicants will be required to participate in a one-day program institute convened by DWD and other involved state agencies. Each regional partnership will be required to send a “leadership team” to the institute. Sessions will include an overview of grant expectations, background on regionalism, workforce issues, and developing collaborative action plans for the region.

V. Other Administration Requirements

- A. **Grant Period.** Grants will run for 12 months. Second year funding may be available pending fund availability, submission of approved renewal application, demonstration of first year accomplishments. Second year funding will support a diminishing portion of grant activities to recognize sustainability through regional financial support/match.
- B. **Matching Requirements.** No cash match is required for first year grants but strong local support and buy-in must be demonstrated by the identification of in-kind match in the form of staffing, leadership, and organizational support for activities.
- C. **Sustainability and Evaluation.** It will be necessary to identify sustainability strategies and plans for evaluation of success of the partnership from the beginning of the grant.
- D. **Allowable and Unallowable Costs.** This grant is intended for building and/or enhancing the regional partnership. Allowable costs to support this goal would include salaries/fringe benefits of staff, travel, facilities, equipment, supplies, consultants/trainers for strategic planning and partnership building, communications/publications. This grant is not intended to provide training or other direct services to incumbent workers, unemployed workers, youth or other workforce program participants or students. Nor may funds be used for capital improvements or other purposes generally not approvable under the WIA.

For Agenda Item II. B.

National Credentialing for Workforce Development Staff *Workforce Investment System Continuous Improvement*

- **For Review and Approval by the CWI Executive Committee on May 9, 2005**
- **Detailed guidance will be provided to Workforce Development Boards in Program Year 2005**
- **Key new decision items/recommendations are in Blue Bold**

A. Purpose and Priorities

A key mission of the CWI is to ensure state and regional economic success. This mission is advanced in part through the CWI's objective to increase the efficiency of the workforce development service delivery system and the quality of services delivered through that system. This project will assist in achieving that objective by providing a staff development framework and fostering continuous improvement consistently in all Wisconsin Job Centers.

This project will help pay for 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 (NAWDP) certification program. **The project will apply the following priorities:**

- **Support new certification in the ten core competency** areas comprising NAWDP's Certified Workforce Development Professional (CWDP) Credential for direct service delivery staff and their supervisors in each of the state's 11 workforce development areas.
- **Support new additional (specialized) certifications** for business and employer services, job seeker services, and management services (for supervisors) **following certification in core competencies.**
- **Support renewal certifications in core or specialized competency areas.**

B. Program Activities

Funds may be used for the following activities:

- Application fees for certifications
- On-line courses to meet competencies
- Memberships in professional organizations (a requirement for certification).

C. Funding and Timeframes

A total of \$22,000 (\$2,000 per each WDA) in CWI WIA set-aside funds will be used to implement the credential program. (In addition, the DWS Bureau of Job Service has budgeted \$15,000 to assist Job Service staff with earning the credential.)

Funds will be available and must be spent in Program Year 2005 (July 1, 2005 through June 30, 2006).

D. Qualification Requirements

- All Job Center direct service delivery staff and their managers/supervisors, including partner agency personnel, can participate in the national certification programs.
- State funds will be allocated to Workforce Development Boards, which will be responsible for establishing procedures/allocating those funds within their area's job center system.

E. Other Administrative Requirements

Implementation will be monitored through the DWD/DWS regular monitoring processes (e.g., inclusion of questions regarding certifications started and completed, etc.); expenditures will be tracked through the DWD/DWS expenditure tracking system.

Summary of Competencies Included in Certification

A. Competencies for the Certified Workforce Development Professional

- **History and Structure of the Workforce Development System:** Understands the history and structure of the nation's multiple workforce development programs and how this impacts the current system. Is able to relate public workforce development policy, initiatives, and funding sources with the current system. Is able to interpret current laws and structure to deliver appropriate services; understands how their own work impacts the system's goals.
- **Career Development Process:** Understands the process by which individuals 1) define their career goals; 2) prepare for, search for, and retain employment; and 3) build skills, advance, and change employment. Is able to identify the kinds of information individuals need, including assessment, in order to make realistic career decisions, and where that information can be found. Knows what skills are needed to search for, obtain, retain, and change employment.
- **Labor Market Information (LMI):** Understands the kinds of labor market information available and the uses of such information. Is able to access, analyze, and use local, state, and national electronic and non-electronic LMI delivery systems.
- **Diversity:** Understands the special employment needs of diverse groups. Is able to adapt materials and services to address these needs.
- **Customer Service:** Understands who are the principal customers of the workforce development system. Is able to identify their needs and expectations and what constitutes positive customer satisfaction. Places appropriate emphasis on "excellence" and "speed of response" in work performance.
- **Program Management:** Understands how programs are designed to use appropriate strategies to meet program goals. Understands how budgets are developed and costs are tracked for individual programs. Is able to use indicators and established instruments to document program performance and outcomes.
- **Communication:** Has good listening and is able to write clearly, including writing a good memo. Is able to speak to single individuals or large groups, in order to teach, inform, or persuade.
- **Technology:** Understands basic computer technology used in workforce development. Is able to demonstrate proficiency or understanding of various computer software applications and the Internet.
- **Collaboration and Problem Solving:** Understands the basic principles of teamwork. Is able to deal with customers, colleagues, agencies, and partner associates in a positive, professional manner. Is knowledgeable about the range of services in the community, and develops and maintains relationships with partners to deliver a comprehensive array of services to customers.
- **Business and Employer Knowledge:** Understands business and employer needs, how the private economy works, the concepts of profit and loss and return on investment (ROI), recruitment and retention of workers, and the role of workforce development in economic development.

B. Competencies for the Management Services Endorsement include:

- **Planning and Design:** Is able to plan services and design programs to meet program goals and diverse community needs, while adhering to legislative, regulatory, and fiscal constraints. Knows about the other programs and services provided in the community, and builds these into a comprehensive, system-wide plan. Is able to market programs and services to funders, partners, and clients.
- **Identification and Development of Resources:** Is able to maximize the effective use of existing resources, and identify, develop, and use new resources.
- **Performance Management:** Is able to define the outcome reports needed for various programs, interpret performance reports, use data to craft specialized performance reports, and use performance information to improve program performance. Understands the concept of program effectiveness and uses that concept in making program decisions.
- **System Capacity Building:** Promotes and supports staff development for the organization's own employees and for partners' and contractors' employees, in order to improve the quality of the system's programs and services. Understands and supports the development needs of a diverse workforce. Operates effective communication systems that keep personnel informed and motivated.
- **Strategic Direction:** Participates in setting a visionary direction for the organization that keeps it stretching to meet higher and higher goals and diverse community needs. Stays informed about potential legislative, regulatory, or policy directions, and is prepared to make necessary changes as soon as they are required. Is able to promote the organization's direction to partner organizations and the community.
- **Quality Improvement:** Is able to implement quality and continuous improvement processes that result in enhanced services to individual and business customers. Involves staff in problem solving and work teams.
- **Presentation Skills:** Is able to conduct research, and develop and deliver effective presentations to single individuals or large groups, in order to market ideas, programs, or services, and motivate staff, partners, and clients.

For Agenda Item II. C.

Workforce Development Board (WDB) Baldrige Express Self-Assessment *Workforce Investment System Continuous Improvement*

- **For review and approval by the CWI Executive Committee on May 9, 2005**
- **Detailed guidance will be provided to Workforce Development Boards in Program Year 2005**
- **Key new decision items/recommendations are in Blue Bold**

A. Purpose and Priorities

This project addresses the CWI's mission of ensuring state and regional success and its related objective to increase the efficiency and quality of the workforce development service delivery system and services delivered through that system. This objective will be advanced by providing a framework for assessing, measuring, and continuously improving WDB organizational effectiveness, including leadership effectiveness.

The project will pay a portion of WDB costs for contracting with the Wisconsin Forward Award (WFA), Inc. to conduct a Baldrige Express organizational self-assessment survey. The key priorities under this project are to:

- Engage each WDB in assessing its organizational effectiveness using a consistent assessment and measurement system of demonstrated validity and reliability,
- Enable WDBs to identify key improvement opportunities and encourage them to plan and implement activities to address those opportunities, and
- Produce consistent statewide measures of organizational effectiveness that can be used to plan needed technical assistance and training and measure improvements over time.

B. Program Activities

The WIA set-aside funds will support the following WDB survey-related activities/products, which will be conducted with WFA, Inc.

- Establish a demographic profile that will define who will participate in the survey.
- Implement the survey process with at least 50 survey participants, including a "testing period" during which survey participants are given instructions for completing the survey and are able to "test" the web-based survey site (if applicable).
- A WFA, Inc. produced Feedback Report and WDB Report Debriefing Session, a half-day meeting of WDB leaders and WFA, Inc., representatives to review the Feedback Report to discuss survey results/findings and to begin planning improvement steps.

C. Funding and Timeframes

- **CWI WIA set-aside funding options:**
 - a. A total of \$13,750 (\$1,250 for each WDB) will be provided to WDBs to pay for half the cost of the basic survey. (Original proposal)
 - b. Up to \$17,500 will be provided to WDBs to pay for the basic survey. WDBs that have participated in a Baldrige-based assessment within the last two years will receive funds to pay for all basic costs of the Baldrige Express (\$2,500); other WDBs will receive funds to cover half the costs of the basic survey (Option a.).
 - c. A total of \$27,500 (\$2,500 for each WDB) will be provided to WDBs to pay for the full costs of the basic survey.

- WDBs will be expected to pay for survey-related costs beyond those paid with WIA set-aside funds. Possible additional costs include: :
 - a. \$1,250 for half of the basic survey charges
 - b. \$40 for each survey in addition to 50
 - c. \$6.00 per survey for paper surveys
- Funds will be available and must be spent in Program Year 2005 (from July 1, 2005 through June 30, 2006).

D. Qualification Requirements

- Fund allocation. State funds will be allocated to WDBs, which will be responsible for working with WFA, Inc. to organize/schedule and implement the survey and follow up activities.
- **Participation options.**
 - a. Participation in the survey is optional
 - b. Participation in the survey is required
- Common demographics. Participating WDBs will be required to include a commonly defined survey population in the survey demographics to increase statewide consistency. DWD/DWS, WFA, Inc., and the Wisconsin Workforce Development Association and/or Wisconsin Association of Job Training Executives will work collaboratively to define the required participants. Additional participants may be added to each WDB's demographics at their discretion.

E. Other Administrative Requirements

- Orientation session. DWD/DWS, with assistance from WFA, Inc. and WDBs that have previously participated in the Baldrige assessment process, will conduct an informational/orientation session with WDB Executive Directors and Board Chairs (or other Board representative) to introduce them to the Baldrige Performance Excellence Criteria concepts and the Baldrige Express. Other participants may also be invited to participate in this session (e.g., CWI members, Chief Local Elected Officials, etc.).
- Statewide report. Following the completion of surveys by all participating WDBs, WFA, Inc. will provide DWD/DWS a state-wide report that it can use to establish a baseline for measuring improvements and planning/implementing future technical assistance and training directed to improving WDB effectiveness.
 - a. The state-wide report will include individual WDB scores (with identities protected), state wide aggregate scores, and key state-wide improvement opportunities.
 - b. To the extent possible, WFA, Inc. will also incorporate improvements demonstrated through comparison of previous WDB assessments.

(This statewide report, valued at approximately \$1,000, will be provided will be supported through the current WF, Inc. grant.)

- State monitoring. WDB implementation will be monitored through the DWD/DWS regular monitoring processes (e.g., inclusion of questions regarding improvement planning and plan implementation); expenditures will be tracked through the DWD/DWS expenditure tracking system.

Baldrige Express in Brief

The Baldrige Express provides an objective assessment that can help a WDB better understand how it is doing in fulfilling its leadership responsibilities and how it can better align all aspects of its organization toward achievement of its key goals. It enables WDBs to apply a proven business model and a consistent measurement framework to improving local board leadership and organizational effectiveness. Offered through the Wisconsin Forward Award (WFA) program in partnership with the National Council for Performance Excellence (NCPE), the Baldrige Express is a behaviorally anchored survey-based organizational assessment. It is focused on seven key management areas included in the Baldrige Criteria: Leadership, Strategic Planning, Customer/Market Focus, Measurement/Analysis/Knowledge Management, Human Resource Focus, Process Management, and Business Results.

The survey is administered either by paper or on-line and includes about 60 questions answered by stakeholders and employees (or a sample of them) and allows written comments by respondents. Survey results are compiled into a written feedback report. This report provides a performance profile that shows an organization where it falls in the Baldrige scoring system (by Criteria Category/Item and overall) and identifies key strengths and key opportunities for improvement. The Feedback Report is generally provided within three days of the end of the survey. In addition to Baldrige Category, Item and overall scores, the Feedback Report includes various charts and graphics that visually depict key strengths and improvement opportunities (bar charts, pareto chart, etc.) and descriptions of the current status of the organization compared to role model organizations.

Example of Questions

Leadership Question: How well do leaders communicate values, performance goals, and clear expectations throughout the organization through words and actions?

Scoring Definitions	
Not Evident	Top level leaders do not communicate values, direction or expectations for the organization.
Beginning	A few top leaders communicate values and expectations to the top levels of the organization.
Basically Effective	Some top leaders communicate strong values and expectations through the way they manage.
Mature	Many top leaders communicate strong values and expectations through the way they manage. They sometimes check to see if their messages are understood.
Advanced	Most top leaders communicate strong values and expectations through the way they manage. They usually check to see if their messages are understood. They sometimes improve communication as a result.
Role Model	Nearly all top leaders communicate strong values and expectations through the way they manage. They regularly check to see if their messages are understood. They constantly improve communication as a result.
NA	Does not apply. I do not have enough information to answer

Comments: Describe how the leaders communicate goals and set performance expectations. Are performance expectations consistent with strategic objectives of the organization? How widely are they understood? Describe improvements to the communication process, if any.

Suggest ways to improve this process.

For Agenda Item II. D.

Understanding Milwaukee's Workforce Development Landscape *Proposed Deliverables*

- **Recommended by the Workforce Development System Committee on April 22, 2005**
 - **For review and recommendation by the CWI Executive Committee on May 9, 2005**
 - **If recommended/approved for funding, State procurement processes will be followed**
-

The University of Wisconsin Milwaukee Center for Workforce Development (CWD) proposes to deliver the following under this proposal:

1. **Identify training/workforce providers in Milwaukee County and develop appropriate survey instrument(s) to learn who they are and how they fit into the larger system.** CWD will work with DWD Division of Workforce Solutions to identify not only all training/workforce providers but also major workforce development stakeholders in Milwaukee County to answer questions regarding their operation and/or what suggestions they have to better integrate themselves or others into the WFD system. Survey instrument(s) will include both web-based and interview formats to accommodate flexibility in gathering information.
 - **The training/workforce providers will include** Milwaukee County Individual Training Account (ITA) providers, relevant WIA required partner programs, (i.e. WIA Adult, Youth & Dislocated Workers programs, Adult Education and Family Literacy programs, Needy Families (TANF) and W-2 programs, Food Stamp Employment programs, Senior Community Service Employment Programs, Vocational and Applied Technology Education programs, Trade Adjustment Assistance programs, Veterans Service programs, Community Service Block Grant programs, Housing and Urban Development Employment and Training Activities and Unemployment Insurance Programs) and relevant Job Center partners and other relevant community- and faith-based providers.
 - **Survey(s) targeted to training/workforce providers** will incorporate the following points for information gathering: Types of programs, program participant information, methods for measuring success rates, funding sources, and employer partnership information.
 - **The major workforce stakeholders** will include past and current partners who offer specific recommendations to improve the Milwaukee Job Center System.
 - **Survey(s) targeted to major workforce stakeholders** will incorporate the following points for information gathering: recommendations for connecting employers, training partners and job seekers, recommendations for full partner participation and interrelationship within the Job Centers, ideas for utilization of funding streams across programs, and the impetus of economic development that ought to drive the system.
2. **Lead the data collection process** through the utilization of the web-based survey(s) and alternative methods for gathering the pertinent information. From our past experience, we realize that to gather information from all providers and stakeholders, phone and in-person interviews, as well as a web-based survey(s), will be necessary.
3. **Dr. Sammis White will conduct the analysis** of information gathered in coordination with DWD Division of Workforce Solutions. The UWM Center for Workforce Development and the DWD Division of Workforce Solutions will jointly then develop and offer recommendations to CWI.

4. **This work will result in a report** documenting the entire workforce development system specific to Milwaukee County. This report will offer the quick glance reference including information on Milwaukee County providers, the overall funding landscape, and recommendations for coordination.
5. **CWD will provide CWI with a product of a one-stop portal clearinghouse** to be hosted on the Workforce Enterprise web-site. This clearinghouse product will incorporate information learned from the providers and stakeholders into a quick glance reference format. This information will be available to anyone with internet access.
6. **This process will provide the Council with a model** that can be implemented throughout the state of Wisconsin.

For Agenda Item III. B. i -- Draft Letter (COBE)

DRAFT

May 10, 2005

Governor Jim Doyle
Office of the Governor
115 East State Capitol
Madison, WI 53702

Dear Governor Doyle:

As your appointed chair of the Council of Workforce Investment, I would like to convey the Council's support for the recommendations offered by the governing boards of the University of Wisconsin System and the Wisconsin Technical College System to increase baccalaureate degrees. In March 2004, the two boards appointed a joint Committee on Baccalaureate Expansion (COBE) to identify cost-effective, collaborative ways to expand the pool of baccalaureate degree holders in Wisconsin. The committee's final recommendations include thirteen strategies and an implementation process that focus on enhancing student success and educational quality, key themes of your administration.

Increasing the percentage of adults with a baccalaureate or post-graduate degree will certainly benefit Wisconsin's economic vitality. An individual with a baccalaureate degree will earn on average about one-third more than a worker without one and nearly twice as much as workers with only a high school diploma. Consequently, this will also contribute to increasing Wisconsin's median income as well. COBE concluded that to enlarge the pool of baccalaureate degree holders, Wisconsin must expand access to higher education for diverse populations, provide market driven solutions, and build the foundation for a long term commitment between the two Systems to increasing access to educational opportunities.

The Council on Workforce Investment shares COBE's concern about the educational attainment level of Wisconsin's residents. We also share COBE's conviction that investing in making higher education opportunities more accessible is key to building Wisconsin residents' earning power. The Council believes that the COBE recommendations will result in a better skilled workforce for Wisconsin. We support the COBE recommendations, and we endorse your recommendation to provide funding for the implementation of those recommendations through the budget. We also encourage the University of Wisconsin and the Wisconsin Technical College System to provide the fullest support possible to successfully implement the recommendations.

Sincerely,

Paul Linzmeyer
CWI Chair
CEO, Bay Towel

Cc: Roberta Gassman, DWD
Brent Smith, WTCS Board
Toby Marcovich, UW Board of Regents
Dan Clancy, WTCS President
Kevin Reilly, UW System President

For Agenda Item III. B. ii -- Draft Letter (Carl Perkins and Adult Family Literacy)

DRAFT

May __, 2005

The Honorable {insert WI congressional delegation name}
United States {Senate or House of Representatives}
{insert address}
Washington DC {insert zip}

Dear Representative/Senator {insert name}:

Because the Wisconsin Council on Workforce Investment is committed to quality workers for quality jobs, we felt compelled to contact you. This letter comes to express grave concern about budget proposals that would eliminate the Carl D. Perkins Vocational and Technical Education Act and result in severe cuts to Adult Education and Family Literacy (AEFL) funding.

Wisconsin's \$25 million in annual Perkins funding provides invaluable services that help secondary and postsecondary students succeed in college and in the workplace. We know we can count on your continued support for the Perkins program because you recognize it helps create the efficient and competent workforce required for a strong Wisconsin economy.

Wisconsin students also need your support for maintaining or increasing AEFL funding available under Title II of the Workforce Investment Act. Under the President's 2006 budget proposals, Wisconsin would lose an estimated \$6 million of \$8 million in annual AEFL funding. Most AEFL funds are used by WTCS colleges to provide instruction that helps adults acquire basic skills so they become more employable and productive.

Again, on behalf of the Wisconsin Council on Workforce Investment's statewide business, education, and government partners, thank you for your ongoing dedication to improving the lives of all Wisconsin residents. We hope you will join us in supporting continued funding for the Perkins program and AEFL. If you would like more information about the Council on Workforce Investment, please feel free to contact any of our members or visit our website at <http://www.wi-cwi.org>.

Sincerely,

Paul Linzmeyer
CWI Chair
CEO, Bay Towel

CC: Roberta Gassman, DWD
Brent Smith, WTCS Board
Dan Clancy, WTCS President
Elizabeth Burmaster, DPI Superintendent

For Agenda Item III. B. iii -- Draft Letter (Youth Apprenticeship)

Draft

May ____ 2005

The Honorable Jim Doyle
Governor
115 East Capitol
Madison, WI 53702

Dear Governor Doyle,

On behalf of the Council on Workforce Investment (CWI), I am writing in support of continuing funding for the Wisconsin Youth Apprenticeship program and additional funding support for Youth Apprenticeship programs in the health care industry.

The Youth Apprenticeship program is an excellent example of an initiative that reflects the mission of the CWI by advancing learning for Wisconsin citizens through innovative PK-16 education and employer based training systems. This program currently serves over 2,200 junior and senior high school students in 22 high skill, high wage program areas ranging from auto technician to information technology to welding. 351 of Wisconsin's 426 school districts are involved with the Youth Apprenticeship program. Last year almost 1600 businesses employed and mentored Youth Apprenticeship students. Over 7600 students have graduated from the program and entered directly into the workforce or continued their post-secondary education.

Your continued support for the Youth Apprenticeship program is appreciated. We believe funding should be maintained and expanded in high need program areas such as health care. Almost 800 Youth Apprenticeship students participated in the health care program in 2003-2004. Legislation to increase funding for Youth Apprenticeship health care programs deserves support. For example, AB 228 would increase funding by \$1.4 million per year in the Youth Apprenticeship health care programs and would significantly increase opportunities for high school youth to receive training in this area. Expansion of the Youth Apprenticeship health care programs compliments the Governor's and DWD's Health Care Agenda.

Sincerely

Paul Linzmeyer
CWI Chair
CEO, Bay Towel

Cc: Roberta Gassman, DWD
Terry Craney< BWBLB

For Agenda Item V

COUNCIL ON WORKFORCE INVESTMENT REPORT TO THE GOVERNOR

Draft Outline – suggest report to do in conjunction with June 3rd meeting

The CWI Report to the Governor should be relatively brief and concise (no more than 10 pages). It is not intended to be a full exploration of issues or a full blown strategic plan, but a clear definition of workforce issues the CWI considers most important, how it intends to address those issues, and how it will measure success. The end product should provide the Governor a general blue print for state workforce investment system-wide efforts. It should also be of value to state agencies with workforce investment responsibilities in considering how their individual programs can contribute to achieving the state's workforce investment system goals and participate in the strategies outlined by the CWI.

The CWI Report could form the framework for the CWI to review state plans for the various workforce programs comprising a coordinated state workforce investment system. Key elements could be incorporated into the WIA Annual Report for which the CWI is responsible.

Finally, the Report could provide the basic information by which to produce a brochure (2-3 pages) that presents the CWI vision, strategic goals, objectives, and strategies. This could be broadly distributed to state and local partners (including business and economic development organizations). The Washington state brochure is a possible model for this product.

I. Introduction

- Purpose of the report
- How the report applies to workforce investment system (across agencies)
- Basic background on the CWI (executive order, purpose/mission, membership, structure)

II. Wisconsin's Key Workforce Investment System Issues

- State of State's workforce/economy (brief LMI overview)
- Governor's Grow Wisconsin Plan (brief overview of workforce investment issues of relevance to CWI)
- Overview of the State's workforce investment system
- Key workforce development issues for the State (long term) and CWI (short term, e.g., two years)
- Potential Measures for the Workforce System and the State Economy

III. CWI Accomplishments to Date

- Organizational Development
- Workforce System Policy and Program Initiatives

IV. The CWI's Future Action Agenda

- CWI Vision
- Key goals (tied to key issues) and related objectives, strategies
- CWI Action Steps in 2005