

Jim Doyle
Governor

Paul Linzmeyer
Chair



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Council on Workforce Investment

TO: CWI Executive Committee Members
FROM: Sheryl Billups, DWD/DWS-Office of Economic Initiatives
DATE: February 23, 2006
SUBJECT: Materials for February 28 Committee Teleconference

Please find attached the materials for the CWI Executive Committee meeting on Tuesday, February 28 at 3:00 p.m. The list of materials is included on the agenda, which immediately follows this memo. The agenda also includes instructions/phone numbers for accessing the teleconference.

The key items for action on February 28 are those related to CWI project funding. Executive Committee actions on these issues will be brought to the full CWI for action on March 16. The following are among key questions/issues for your consideration.

IIA -- Overview of Proposed Use of Fund

This provides more detail to the general discussion on use of CWI funds discussed at the February 2 Executive Committee meeting. It identifies specific focus areas and fund amounts for potential use of the CWI's remaining Program Year (PY) 05 funds and expected PY 06 funds.

1. Do the funding areas identified for PY 05 and PY 06 reflect where the CWI should focus the \$922,550 funds available for this period?
2. Are the percentage/dollar amounts proposed appropriate?
3. What changes in focus areas and/or amounts, if any, does the Committee propose?

IIB -- Draft Special Project Solicitation and Application Submission Requirements

This provides details of the Special Project Solicitation discussed at the February 2 Executive Committee Meeting, including general project guidance and specific application submission requirements. Among key questions/issues:

1. Proposal Concept Objectives:
 - The objectives listed are all six objectives identified by the Workforce Strategies and Workforce System Development Committees and included in the Report to the Governor. Do these reflect the scope of projects recommended by the Committee? If not, what changes are suggested?
 - All Committee-developed strategies related to specific objectives are incorporated. Some of these have been or are in process of being addressed (marked in yellow). Should the guidelines identify specific priorities and/or other details related to the strategies? If so, what should they be? What other changes are recommended to ensure potential applications focus on key CWI interests?
2. Funds Available. This section specifies the dollar amount available (\$400,550) for the overall project solicitation and suggests a cap on individual project requests. Should a cap be included and if so, how much?
3. Overall Project Guidance: Does the Committee have additional expectations about projects that will be funded through this process that should be incorporated into the Project Guidance document?
4. Project Solicitation Submission Requirements: Do information elements requested address all areas of interest to the Executive Committee? What changes, if any, do you recommend?

Other items on the agenda are for information and/or discussion as time allows. Agenda Items III and IVA and B will be brought to the full Council for action on March 16. The Executive Committee approved Agenda Item III with change on February 2; changes have been incorporated. The Workforce System Development Committee approved Agenda Items IV A and B on February 17.

COUNCIL ON WORKFORCE INVESTMENT

EXECUTIVE COMMITTEE TELECONFERENCE

Tuesday, February 28, 2006
3:00 to 4:00 p.m.

To Attend In Person:
201 East Washington Ave., Room A 415
Madison, WI 53703

AGENDA

- I. Call to Order and Minutes of February 2, 2006 Meeting -- **For Action**
- II. Project Concepts for Possible CWI Funding
 - A. Draft Overview of Proposed Use of CWI WIA Statewide Activity Project Funds -- **For Action**
 - B. Draft Special Project Solicitation Guidance/Application Submission Requirements -- **For Action**
 - C. GROW Grant II Proposal -- For Discussion
 - D. Advanced Manufacturing Project Proposal -- For Discussion
- III. CWI Criteria and Process for Project Funding, Revised to include comparison and flow chart (Approved at Feb 2nd Mtg) -- For Information
- IV. CWI Workforce System Development Committee Recommendations -- For Information and Discussion
 - A. Recommendations to the Governor (to enhance the operation and performance of the state's workforce programs)
 - B. Ad Hoc Committee (Milwaukee Report) Recommendations
- V. Adjourn

To Access This Teleconference

Participants **outside of the Madison calling area**: Dial the toll free number, **1-888-677-9189**; when prompted, enter conference code **2629 followed by the pound (#) key**.

Participants **within the Madison calling area**: Dial the local number, **(608) 316-0022**; when prompted, enter **2629 followed by the pound (#) key**.

If you have problems getting connected, call Wisline's Helpdesk at 1-800-442-4614 (in Madison or toll free).

Interested parties may attend the meeting in person at the State Labor Building (GEF 1), Room A 415. All visitors to the State Labor Building must use the main entrance at 201 East Washington Avenue and obtain a visitors pass at the reception desk. This entrance is handicap accessible.

Meeting Materials

1. Agenda (Page 2)
2. Minutes of February 2, 2006 Executive Committee meeting (Page 3)
3. Draft Overview of Proposed Use of CWI WIA Statewide Activity Project Funds (Page 5)
4. Draft Special Project Solicitation Guidance and Application Submission Requirements (Page 6)
5. CWI Criteria and Project for Project Funding, Revised (Separate Document)
6. Recommendations to the Governor (page 11)
7. Ad Hoc Committee (Milwaukee Report) Recommendations (Page 14)

Meeting materials are posted on the CWI web site at <http://www.wi-cwi.org/>. For questions about the agenda, contact Sheryl Billups, Department of Workforce Development, Division of Workforce Solutions by phone at 608-266-9615 or by email at sheryl.billups@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.)

Agenda Item I -- For Action
COUNCIL ON WORKFORCE INVESTMENT

(Draft Pending Approval)

EXECUTIVE COMMITTEE TELECONFERENCE

201 East Washington Ave. -- Madison, WI

Thursday, February 2, 2005

MEETING MINUTES

Members Present: Paul Linzmeyer (Chair), Joel Rogers (Vice Chair), Roberta Gassman, Tina Koehn, Douglas Moquin, Aaron Olver (for Mary Burke), Lee Rasch, Christopher Ruud, Dean Welch

CWI Staff Present: Sue Gleason, Sheryl Billups

Others Present: Connie Colussy, Dianne Reynolds, Dick Jones (DWD); Pat Schramm (South Central WDB)

Key Issues/Discussion

I. Call to Order/Minutes

Paul Linzmeyer, chair, called the meeting to order at approximately 2:30 p.m.

Action: Joel Rogers moved, Roberta Gassman seconded, to approve the minutes of November 4, 2005 meeting. The motion passed unanimously.

Linzmeyer reordered the agenda to address possible CWI projects for funding prior to addressing the funding process to ensure all members could participate in discussion.

II. Project Concepts for Possible CWI Funding

Sue Gleason reviewed funding ideas outlined in meeting materials (pages 9-10), noting that the CWI will have close to \$1 million to plan for considering current year and next year (Program Year 2006) funding. She also suggested the potential for announcing CWI project funding decisions at the May Governor's Employment and Training Conference. To do so will require a quick turn around from approved concept to approved project.

Among issues discussed were the following:

- Opportunity to learn from Wisconsin's experience with the US DOL WIRED grants.
- Interest in projects that support high-value added strategies in key industries.
- Availability of additional/other fund sources, including larger Governor's WIA discretionary fund (10%) and funds available to the larger system through other agencies.

Secretary Gassman explained that WIA "discretionary" funds are used to support a variety of state activities and related staff required to administer the WIA programs (e.g., Job Center IT systems, training provider lists, performance reporting systems, etc.). In addition, funds needed to be available for Governor's priorities and/or unexpected needs. She also noted that if some of the CWI's ideas require more than the \$1million available, she would be willing to discuss additional funds with the Governor.

Among other comments/discussion addressed were the following:

- The need to look beyond WIA funds, to funds that may be available from the larger system, for example Technical College System funds (\$20 million in categorical funds, most of which is distributed through request for proposals and targeted).
- The effectiveness of regional collaboration in driving funding and the need for the CWI to continue to push for faster growth and high expectations of the GROW grants; consider match requirements for the 2nd round of grants.
- The GROW Leadership session in April as an opportunity to assess where various regions are as well as to discuss regional metrics proposal.

In discussion of specific funding proposal ideas, Gleason indicated that new project solicitations would need to be done quickly and could link to things the CWI is currently doing. Ruud noted that the Systems Development Committee has created about 15 action steps and identified its top five strategies, which could serve as potential funding areas. This would ensure dollars are spent on things the Committee has done. Welch supported the idea, suggesting linking to clusters and industry sectors, which has been a focus of the Strategies Committee. Other discussion focused on the need for clear focus and attainable objectives, the need for metrics that recognize the varying degrees of maturity among regional collaborations, and the complexity of industry initiatives (e.g., manufacturing), which may benefit from "best practice" sharing.

The committee agreed that another meeting should be organized for further discussion on this issue prior to the full CWI meeting on March 16. Gassman suggested general direction: big chunk to regional efforts, focus on manufacturing, and new project solicitation. The Committee could review parameters/more specifics for funding the new projects.

III. CWI Project Funding Process, Revised

Billups provided a brief overview of the revised CWI project funding process. Christopher Ruud commented that changes were not easy to follow and suggested revising the draft paper to incorporate a funding flow chart and highlight differences from the current policy. Ruud also suggested that something be included to require acknowledgment of CWI funding (referring to Milwaukee Landscape Study issue).

Action: Doug Moquin moved to accept the revised criteria with the addition of highlighted changes, graphic flow chart, and acknowledgement of the CWI role in external communications. Lee Rasch seconded the motion and it passed without objection.

IV. Adjournment

As time for the meeting expired, other agenda items were deferred and the meeting was adjourned.

Agenda Item II A -- For Action
(Continuation of February 2, 2006 Teleconference Issue)

DRAFT

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. Attachments provide more detailed information about the specific funding categories suggested.

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 ¹	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.

¹ Includes UWM Milwaukee Study and Southwest Wisconsin Technical College Study in PY 04 and PY 05 respectively.

Agenda Item II B -- For Action
(Follow-up to February 2, 2006 Teleconference Issue)

**Council on Workforce Investment
SPECIAL PROJECT SOLICITATION GUIDANCE
and
APPLICATION SUBMISSION REQUIREMENTS**

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

Funds made available through the CWI must address at least one of six objectives the CWI expects to address in 2006 to further its mission, vision and goals. These objectives and CWI identified strategies to advance them are listed below. Strategies are listed for information. Applicants are encouraged to identify specific approaches that will contribute to achievement of the CWI's efforts.

1. Workforce Information. Improve 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 easily usable in public and private decision making. Among key strategies of interest to the CWI are:
 - a. Identify skill gaps facing current employers and workers in established industries/occupations.
 - b. Identify additional data needs at the regional level to assist in economic development, education, and workforce planning. *CWI Regional Metrics supports this strategy.*
 - c. Develop techniques and mechanisms to quickly identify state and regional opportunities.
 - d. 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.
2. Workforce Preparation and Support. 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. Among key strategies of interest to the CWI are:
 - a. Maximize the development, effectiveness, and use of distance education technology.
 - b. Provide for a workforce preparation system that is more flexible and responsive to economic needs.
 - c. Transition to a career development system that is transparent, accessible and has the capacity to meet the needs of a diverse citizenry and workforce.

- d. Strengthen access and articulation to post-secondary education and work, such as recommended in the Committee on Baccalaureate Expansion Report.
3. Targeted Regional Priorities. Increase opportunities for innovative regional partnerships that support opportunities and advancement in key occupational sectors. Among key strategies of interest to the CWI are:
 - 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. **CWI GROW grants support this strategy.**
 4. Service Delivery System. 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. Among key strategies of interest to the CWI are:
 - a. Advise the Governor on a vision for Wisconsin's Job Center System. **Workforce System Development Committee draft "System" recommendation to the Governor and Ad Hoc Committee recommendations support this strategy.**
 - 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. **Workforce System Development Committee plans to develop "Program/Dashboard" metrics address this strategy.**
 - d. Provide guidance, identify needs, and changes to meet the vision.
 5. Coordination and Collaboration. Increase and improve state and local interagency communications and strategic/program planning to ensure alignment and effective implementation of CWI goals. Among key strategies of interest to the CWI are:
 - 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. **Workforce System Development Committee and Ad Hoc Committee focus groups, surveys and listening sessions, as well as UW Milwaukee Landscape Study, support this strategy.**
 - 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. **Workforce System Development Committee plans to develop "Program/Dashboard" metrics may address this strategy.**
 - e. Guide state level planning measures and coordination focused on strategic issues.
 6. Maximizing Resources. Increase collaborative use of existing resources and use new alternative funding resources, including discretionary federal grants. Among key strategies of interest to the CWI are
 - a. Disseminate best practices for maximizing resources.
 - b. Identify "road blocks" from surveys and recommend strategies to address them.
 - c. Review performance of WIA and target funding for performance awards, technical assistance, and training. **CWI/ DWD policies and DWD funding currently in place for Incentive Awards; CWI funds for staff certification and Baldrige Leadership Assessment support this strategy.**
 - d. Establish metrics to measure the value of funds for infrastructure system support and workforce program gaps.
 - e. Assess how to effectively infuse funds into the system. **Workforce System Development Committee draft Recommendations to the Governor in part support this strategy and strategy e below.**
 - f. Explore foundation and business entities.
 - g. Improve collaborative approaches to grant writing.
 - h. Target resources in key areas.

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 \$ _____. 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

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.

**Council on Workforce Investment
PROJECT SOLICITATION SUBMISSION REQUIREMENT**

Applicants interested in applying for CWI WIA Statewide Activity funds under this special solicitation must submit a proposal concept 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 Activities²

- a. Evaluations of WIA activities, in coordination with local boards, for adults, dislocated workers and youth in order to promote continuous improvement
- b. Provide incentive grants to local areas for:
 - i. Regional cooperation among local boards
 - ii. Local coordination activities
 - iii. Exemplary performance³
- c. Assisting in establishment and operation of the one-stop delivery system
- d. 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

² 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.

³ Performance incentive awards currently provided under policy established by the CWI in 2002.

Agenda Item IV A

*Recommended by Workforce Systems Development Committee for Information/Discussion
To be brought to full Council on March 16, 2006*

**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

Wisconsin's Job Center Standards and Workforce Investment Act Plan 2005-07
State Workforce Education and Training Programs by Funding Level
2005-2006

Program	Funding Level	Agency	Job Center Partner
Education, Training & Related			
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	
Income Replacement/Cash Benefits			
Unemployment Insurance Benefits	\$ 836,500,000**	DWD	X
Wisconsin Works Cash Benefits	52,441,965	DWD	X
Trade Adjustment Assist. Allowance	36,800,000	DWD	X

** 2005 funding levels; 2006 not currently available.

Agenda Item IV B

*Recommended by Workforce Systems Development Committee for Information/Discussion
To be brought to full Council on March 16, 2006*

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.**
 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 9th 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 Rigganbach, 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 it is 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.