

Workforce Investment Act

Summary of Local Plans

September 2006

**Wisconsin Department of Workforce Development
Division of Workforce Solutions
Bureau of Workforce Programs**

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35% High Wage Job Training Requirement

In recognition of the need to make a greater effort towards moving people being served through our Job Center system into jobs that will help them achieve financial stability, the Department is requiring, beginning in Program Year 2006, Workforce Development Boards to spend 35% of their Adult, Dislocated Worker and Special Response allocations, less the 10% for administration, on training and training supports leading to high wage jobs. We have also heard from employers that they need more skilled workers. The 35% requirement helps address our skilled workforce challenge and will assist businesses in expanding their workforces and growing our economy.

The Department implemented this requirement through the issuance of the WIA Local Plan Guidelines Part 2; an Administrator's Memo was also issued. The Department has shared information with the WDBs regarding median wage levels for their WDAs and plans to update this information annually. In response to questions from the WDBs, the Department has also created a 35% High Wage Job Training Requirement questions and answers document that can be found on the WIA webpage: <http://www.dwd.state.wi.us/dwdwia/>

There was no specific response item in the WIA Local Plan Guidelines Part 2 related to the 35% High Wage Job Training Requirement. However, the Department did receive a number of questions and concerns related to this from the WDBs. In response, the Department has created a workgroup which includes WDBs Directors to review the implementation of this requirement.

Memorandums of Understanding (MOUs)

The MOU is the document through which partners make a commitment to the WDB, with the agreement of the Chief Elected Local Official (CLEO), and to each other on how they will support the Job Center system and coordinate services throughout the WDA. The MOU has two parts: Part 1 is the agreement between the WDB and a single One Stop Operator (OSO), and Part 2 is the agreement between the WDB and the Comprehensive Job Center(s) managed by that OSO. A WDB will have as many MOUs as it has CJs.

Review and approval of the MOUs is currently underway. Each WDB will be monitored early next year by the Local Program Liaisons. As part of that monitoring, LPLs will ensure that coordination and partnering is occurring, that each CJC is meeting the Job Center Service Standards requirements, that partners are meeting their financial obligations towards the Job Center system, and that job seekers are receiving appropriate services without overlap or duplication.

Business Services Plans and Teams

WDBs are responsible for ensuring that business services are provided in an integrated non-duplicative manner across the WDA. Each CJC must develop a Business Services Plan for its Center and affiliated APS. If a WDA has multiple Comprehensive Job Centers, and therefore multiple plans, they must be coordinated to ensure that all areas of the WDBA are covered, without duplication. Each employer will have a single source of contact. The Business Services Team will focus on targeted employers. Business Services Plans were due September 1 and are in the process of being reviewed.

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WDA #1 - Southeastern Wisconsin Counties of Kenosha, Racine, and Walworth

One-Stop Operator (OSO) Designation

The area has a specific OSO for each center and the OSO is different and mutually exclusive for each. Each OSO employs a manager who is responsible for leading the operations of the center.

Fees for Service

Each one stop business service unit conducts periodic fee-based activities including trainings, job fairs, specialized assessments, facilities charges, brochure development, resume screening, and staff leasing. Business service units revise, modify and expand services on a continual basis. New fee generating activities may include selling ads on business service websites.

Other Sources of Income

The management team within the workforce area actively researches unique funding opportunities through a wide range of sources. Assistance is provided by a professional grant writer employed by one of the counties, a contracted consultant through another, and the grants department at a university.

The regional GROW initiative has a major focus area on identifying available foundation funding, along with funding priorities. As part of this project a donors forum will be held in early 2007 to establish dialogue and network with large scale national funding entities.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – The WDB and Local Elected Officials intend to defer participation in the Baldrige Express Self-Assessment. As an alternative, the Board will develop and adopt a locally developed system that includes the key components included in quality systems. The system will include an inventory of policies and practices employed by the center, documentation of activities, and review and feedback from an ad hoc team of the WDB. This system will be developed by September 2006, with an initial review completed by March 2007.

NAWDP Credentials - The WDB plans to have four individuals participate in the credentialing process through CWI funding. The identification of the four individuals is pending, so no specifics were provided on what staff positions at the WDA will be working toward their NAWDP credential.

Financial Literacy

Financial literacy services through the one stop centers include:

- 2-hour, bi-weekly sessions conducted onsite by a representative of a local banking center. The session is part of a larger workshop with an average attendance of 15 individuals.

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- Monthly workshops entitled: Basic Finance, Investment Practices, Understanding Your IRAs and Tax Benefits, Money Matters Part I, Money Matters Part II., Renting Matters, and Ins and Outs of Retirement Plans.

Youth Financial Literacy – No details were provided on separate programs offered for youth.

Financial Referrals – Individuals are referred to Family Services of Racine for services targeted to those facing financial crisis and to Consumer Credit Counseling Services.

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WDA #2 – Milwaukee Milwaukee County

One-Stop Operator Designation

Job Center Network Committee of the Board was charged with the responsibility of designating a One-Stop Operator (OSO). They recommended a consortium consisting of three of the required One Stop partners: the President/CEO of the Milwaukee Private Industry Council, the President of the Milwaukee Area Technical College, and the District Director of Milwaukee Job Service. The full Milwaukee County Board of Directors accepted this recommendation at their meeting on April 20, 2006. The Consortium is established via an agreement between the Local Board and three consortium members. Milwaukee Private Industry Council staff will serve as the administrative entity to the Consortium. The Job Center Network Committee acts as the oversight body for the OSO Consortium. The Committee will submit all major approval items to the full Board for final consideration.

Fees for Service

The Business Services functional team led by OSO administrative staff in the CJC will take a primary role in the development of the Center's strategy. The OSO will approve the strategy and make certain that it links to the WDA strategy. The functional unit will consist of partner staff with an expertise in employer-related services, including recruitment, pre-screening, assessment, employer relations and dissemination of job postings. Preliminary indications lean toward the production of job fairs as the most viable activity to produce a fee. There are many logistic, administrative and financial issues that accompany launching for fee activity and the WDB recognizes that it will need to take a leadership role in addressing these hurdles.

One obstacle to Business Services in this WDB has been the misperception that the One-Stops are to serve W-2 clientele exclusively. Effective marketing and branding will create a new, more realistic dynamic in employer relations with the One-stops' services. To accomplish this, the PIC will build on its and Wagner Peyser's established track records of presenting the employer community with useful information on such topics as employee substance abuse, the legal parameters of the hiring process, characteristics of Limited English Proficient jobseekers and information on tax credits/incentives.

Other Sources of Income

The Private Industry Council has been proactive and successful in diversifying funding streams. Historically, the PIC has received funding from such entities as the United Way, the Helen Bader Foundation and private employers to further workforce-development programming in the County. These past successes have benefited the WDA and its partners. The PIC will continue to seek additional funding to the benefit of the entire WDA and Job Center System.

In addition, the PIC is part of the Regional Workforce Alliance, a regional collaboration of workforce boards, economic development agencies, government and business. RWA has begun soliciting funding from outside sources to fund initiatives for the region, the respective WDAs and the partners. Through the GROW and WIRED grants, as well as other points of intersection, the PIC will continue to support regional fundraising and economic development

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efforts. These efforts certainly will provide opportunity for the workforce development area and its partners from the regional development perspective.

However, since the initiative for developing resources for the Job Center System is a new one, the WDB and its partners will begin detailed discussions on how the system should address fund development. A particular policy has not been developed at this point relative to the specifics of securing funding. Further, a realistic analysis must occur first before launching any type of initiative. The size, strength and funding levels of the collective partners pose a number of issues for soliciting funds particularly when it is to execute a mission already funded to carry out. Determining a plan will be a central objective of system leadership (MJCN/OSO) with and the CJC partners.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – The PIC has engaged in continuous improvement activities, most recently the 2003 Marquette University report using Baldrige criteria. Up to now the PIC has not solicited CWI funds for a Baldrige

Self-Assessment - The Board may find this process helpful once a workforce infrastructure has been established. In addition, the PIC's program monitoring component has always relied on feedback from service providers and customers as an impetus to system and process improvements.

NAWDP Credentials - The first round of credentialing training through CWI funding will incorporate PIC managers, and designated front-line staff providing Core services in the two PIC APS facilities, the HIRE Center and the Milwaukee Career Center. The performance evaluation of managers will include an element that addresses whether they have attained this credential and/or their progress toward meeting this goal. In addition, 20 PIC Youth Division staff are in the process of acquiring the NAWDP credential.

To facilitate credentialing in the local area, the PIC plans to purchase computerized, self-paced components that staff can study when time permits. A professional certification program offered by Dynamic Works Institute is being considered.

Financial Literacy

PIC staff are trained in Federal Deposit Insurance Corporation (FDIC) financial literacy program to help youth and adults outside the financial mainstream enhance their skills and create positive bank relationships. Several PIC staff have FDIC certification to "train-the-trainers" in the Money Smart Program and are looking to train selected One-stop staff.

Youth Financial Literacy – The Milwaukee Career Center Specialty Youth one-Stop has integrated the Smart Money Program into its Job Readiness Training (JRT). Approximately one hour of JRT is dedicated to financial literacy, and students are provided materials and handouts from the Smart Money curriculum.

Financial Referrals – Not offered. The PIC plans to have information about credit rehabilitation counseling resources, including UW-Extension list of recommended providers available on a self-selecting basis. This will not be mandatory part of their financial literacy services.

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WDA #3 Waukesha-Ozaukee-Washington (W-O-W) Counties of Waukesha, Ozaukee, & Washington

One-Stop Operator Designation

Has designated a management team in each of the three counties to be the OSO; one operations manager.

Fees for Service

WOW Business Services Team currently provides job fairs to employer customers on a fee-for-service basis. The Business Services Team in the WOW WDA has offered services for a fee since 1997 and will continue to do so in the future.

Other Sources of Income

The organizational structure of WOW Workforce Development, Inc. includes a Planning and Evaluation Unit that is responsible for seeking funding beyond what is provided through the WIA formula process. They are constantly searching for opportunities to obtain funding for programs and services that will benefit the entire WDA. A recent example is the “Keys to Work” program funded through the Wisconsin Employment Transportation Assistance Program (WETAP). Eligible participants include low income workers whose primary barrier to sustained employment is transportation. Participants do not have to be enrolled in WIA or W-2 to be eligible for the Keys to Work program.

The plan for continuing to seek outside funding consists of the following elements:

Enhanced search capabilities – WDI currently subscribes to GrantDomain.com, an Internet grant seeking tool that includes information about grants available from federal, state, and private foundations (both corporate and community). Planning and Evaluation staff receive email updates about grant opportunities from Grants.gov and other electronic newsletters.

Training – The WDI Planner will attend a week-long Grantsmanship Training Program sponsored by The Grantsmanship Center and UW-Milwaukee in April 2006. Tuition includes membership benefits. Other Planning & Evaluation Unit staff will continue to attend workshops and other training as appropriate. Past training has included Boris Frank and Miner & Associates workshops.

Additional training opportunities will be sought that will allow planning staff to increase their knowledge of the regional economy and the needs and service gaps that exist in the WDA. Participation in a center staff certification program as well as the NAWDP national credentialing program will be a part of those efforts.

Collaboration – There is agreement among all three Southeast Wisconsin WDAs that successful grant seeking should involve collaboration among regional workforce development entities. Opportunities for grants are shared and discussed as they become available. Recent examples of collaborative efforts include the regional GROW grant and the Department of Labor WIRED initiative.

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GROW grant activities led by the Milwaukee Mayor's office include the formation of a regional funding collaborative, and hosting an annual donor's forum. Both of these activities are designed to bring more funding for workforce development to the region.

Partners within the Workforce Development Centers also collaborate on grant proposals when appropriate. WOW Workforce Development, Inc. was involved in Waukesha County Technical College's \$2.3 million Community Based Job Training Grant funded by DOL in 2005. As part of that project, WDI will receive \$200,000 to provide assessment and job placement services through a subcontract arrangement. The Waukesha County Economic Development Corporation is a partner in the Southeast Wisconsin GROW grant.

Networking – Planning and Evaluation staff regularly attend and/or host meetings, roundtables, and community events in order to increase and enhance contacts that may be beneficial to future grant seeking initiatives. The WDI Planner attends the Planner's and Grantwriter's Roundtable, which meets bi-monthly at the Nonprofit Center of Milwaukee and is facilitated by Milwaukee PIC staff. Other P&E staff attend Waukesha County School-to-Work Consortium meetings and serve on the leadership teams for Project Lead the Way in three school districts. WDI has sponsored a Boris Frank grant writing workshop and hosted an open house for community-based organizations.

Exploration has begun into various strategies for delivering more comprehensive financial literacy information to customers on a regular basis. The primary format being considered is a workshop, which may be stand-alone or incorporated into an existing workshop series. Funding for this service will be a challenge and will have to be creatively addressed.

Possible resources include:

- Existing center partner agencies
- U-W Extension
- Consumer Credit Counseling Service
- Local financial institutions

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – WOW WDB conducted the Baldrige Express Self-Assessment funded by the Council on Workforce Investment. During the January 2006 Board meeting, the survey instrument and our purpose for conducting the self-assessment was explained. Board members could complete the survey on-line or in a paper format. The results report is currently under development.

NAWDP Credentials - The opportunity for professional development through the Certified Workforce Development Professional (CWDP) program was introduced to center staff in all four locations in March. Information was presented at all-staff meetings through brochures and other handouts, a PowerPoint presentation overview, and a guest speaker who is certified and serves on the certification review committee.

A self-assessment form was developed to assist center staff in gauging their progress toward qualifying for certification. WOW Workforce Development Inc. (WDI) will be required to complete the form and discuss the opportunity with their supervisor. Center-wide training may be offered in one or more competency areas where a majority of staff gave themselves a low rating.

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WDI employees in selected positions who meet the education and experience criteria will be encouraged to work toward certification. A priority order may be established if the demand for training that leads to certification exceeds the funding availability. Case managers, business services representatives and supervisors will initially be given higher priority.

Financial Literacy

The UW-Extension presents a workshop entitled, “Managing Your Resources” every Tuesday at the Pewaukee center. This workshop provides customers with tools to create an effective budget and understand where their money is really being spent, gives tips on stretching food dollars while developing a good nutritional plan, and also discusses time management strategies and goal setting to simplify the customer’s life. At the West Bend WDC, financial planning workshops began in May and are offered quarterly. A financial counselor who also teaches workshops at the University of Wisconsin, West Bend Center (UWWC) is the teacher. Workshops are for any center customers of the West Bend, Hartford or Mequon centers. Small numbers of customers do not warrant workshops in Mequon. Workshops provide customers with tools for effective management and budgeting of income.

Case managers routinely provide customers with information at all centers on the following programs:

- Federal Earned Income Tax Credits and Child Tax Credits
- State Homestead Credit
- Volunteer Income Tax Assistance (VITA) and free American Association of Retired Persons (AARP) tax preparation service
- S.H.A.R.E. program provides groceries in exchange for community service
- First Call for Help Line (211), which provides consumer credit counseling
- LaCasa de Esperanza’s Self Sufficiency Program for customers receiving assistance through the Waukesha county Housing Authority
- TANF-funded Job Access Loans
- TAA participants are required to complete a financial plan as part of the enrollment in long-term training (pp. 21-22)

Youth Financial Literacy – No details were provided on separate programs offered for youth.

Financial Referrals – Center agencies in Pewaukee generally refer customers to the UW-Extension workshop provided at the center. Threshold customers at the West Bend center who need assistance with determining the impact of working on their Social Security benefits are referred to CCSA’s disability specialist or the Social Security Administration. WDB is exploring various strategies for delivering more comprehensive financial literacy information to customers on a regular basis. The primary format being considered is a workshop, which may be stand-alone or incorporated into an existing workshop series. Possible resources include: existing center partner agencies, UW-Extension, Consumer Credit Counseling Service and Local financial institutions.

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WDA #4 – Fox Valley Counties of Calumet, Fond du Lac, Green Lake, Outagamie, Waupaca, Waushara and Winnebago

One-Stop Operator Designation

The Fox Valley Workforce Development Board (FVWDB) and Local Elected Officials met jointly on March 16, 2006 to review the plan modifications. They approved the recommendations from the One Stop partners and Management Teams to continue to have FVWDB act as the One Stop Operator for fiscal purposes and meeting facilitation. All Center Management is done through Management Teams utilizing consensus format for decision making.

Fees for Service

Business: Other services include fee for service products such as JobFit Job Match Patterns, prescreening, lean training practices, and background checks, etc. as provided through One Stop partners. The Board will focus its resources and services on small to medium sized business. The Board will work with the One Stop system and partners to assure a streamlined seamless service delivery to business on a regional approach. The services will range from in-kind to fee-based for value added type products. The FVWDB is also working with local economic development professionals, chambers, and educational institutions to create entrepreneur incubator sites.

The Board Administrator has been meeting with Workforce Economics, Inc. business reps, VETS, and Wagner-Peyser Business Reps to further fee-for-service products. FVWDB has been providing business services prior to the Wisconsin Job Service Program Operations Plan, but will work with local Job Service staff to assure a streamlined approach for business utilizing all the “business reps” from all the programs in order to assure capacity to service the large number of small to medium businesses in the FVWDA.

Other Sources of Income

The One Stops have created other revenue sources through Job Fairs, Labor Law Clinics, Workshops, and room rentals which have provided additional funding resources. FVWDA continues to seek additional funding through grants. FVWDB will request that the Management Teams in each of the centers discuss other opportunities for funding.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – Fox Valley WDB has already taken the Self-Assessment and received the results.

NAWDP Credentials - All Core service staff (supported by WIA funds) will be provided opportunity to complete the credentialing process. All WIA case managers will be asked to also complete the credentialing.

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Financial Literacy

Currently, the three Comprehensive Centers have training provided through existing community resources, such as the University of Wisconsin Extension and Financial Information Service Center. In addition, all centers provide financial literacy resources through Federal Deposit Insurance Corporation MoneySmart tutorials.

Youth Financial Literacy – Youth are receiving “Reality Store” workshops throughout the year in the local school system, sponsored by Fox Valley WDB, local school districts, and DWD. This utilizes 57 community volunteers from public and private sectors for each workshop. This has been initiated through the Grow Wisconsin grant and will continue.

Financial Referrals – WDB did not provide financial referral information.

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WDA #5 – Bay Area Counties of Brown, Door, Florence, Kewaunee, Manitowoc, Marinette, Menominee, Oconto, Shawano, Sheboygan, and Oneida Tribe

One-Stop Operator Designation

Management team of each CJC is designated as the One-Stop Operator (six or more mandated partners); non-competitive, sole source process.

Fees for Service

The primary mechanism for the generation of additional non-WIA funds is the contracted position of grant writer which began in July 2005. The contract has a goal of 3 grants that complement the Board's employment/training/economic development goals. Additionally the Board will provide technical assistance to the job center system on fee for service strategies and through the WIA services contracts require each center to offer and promote business services for a fee.

Each Business Services Team will identify in the Business Services Plan at least one business service that conforms to the WDA fee for services policy/plan.

Other Sources of Income

The primary mechanism for the generation of additional non-WIA funds is the contracted position of grant writer which began in July 2005. The contract has a goal of 3 grants that complement the Board's employment/training/economic development goals. Additionally the Board will provide technical assistance to the job center system on fee for service strategies and through the WIA services contracts require each center to offer and promote business services for a fee.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – The Bay Area WDB has funded and completed a Baldrige based strategic leadership process and will not be requesting additional funds. Bay Area began the Self-Assessment process in 2002 and completed the process in 2003. In 2004 a follow up on the progress of the process was conducted. The Board contracted with Wisconsin Forward Award to provide six Baldrige based strategic leadership sessions with the board and three sessions with the job center management teams.

NAWDP Credentials - In addition to the \$2,000 from the Council on Workforce Investment, the WDB has allocated an additional \$20,000 to provide NAWDP credential process to all job center case managers, supervisors or WIA contractors. All WIA funded case managers (36) will participate in the credentialing process.

Financial Literacy

Each job center provides financial literacy education and counseling or referral to a counselor. The service is provided individually through case managers and W-2 Financial and Employment

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Planners and also in group settings. Dislocated Workers are provided workshops on the options and tax issues in the rollover, reinvestment and withdrawal of retirement funds. The workshops are provided through the technical college to avoid the promotion of a specific investment/financial planner.

Youth Financial Literacy – No details were provided on separate programs offered for youth.

Financial Referrals - Referrals to specific financial consultants or credit rehabilitation centers are to program/agencies that offer the service without charge.

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WDA # 6 North Central Wisconsin Counties of Adams, Forest, Langlade, Lincoln, Marathon, Oneida, Portage, Vilas and Wood

One-Stop Operator Designation

NCWDB will designate the OSO responsibilities to a consortium of at least three mandatory partners.

Fees for Service

The second tier of funding will consist of an aggressive Fee for Service (FFS) program in which Business Service Teams (whose members wages are paid by federal program funds) offer allowable services to business to enhance federal program income, while not charging for core services that are already available through existing resources.

The Business Service Teams will continue to offer traditional services such as Job Fairs, Labor Law Clinics and workshops. While traditional services are the basis, it will be necessary for the Business Service Teams to identify new and improved services that will assist business in developing incumbent worker skills, recruitment of new workers and enhanced human resource services, e.g. Personnel Manuals. The Business Service Teams will ascertain the needs of employers while conducting business contacts throughout the region. As employer feedback is analyzed, appropriate, allowable, new, expanded and /or additional services will be developed to meet the needs of employers.

Regional CJC Business Service Teams will hold Job Fairs provided in the spring and/or fall. Therefore giving businesses the opportunity to network and recruit employees while the OSO is able to recoup operating capital for the WDA.

There will be one annual Labor Law Clinic coordinated through the OSO Business Services Sub Committee.

Presently, two new products are under development to assist employers in hiring well qualified employees. Workkeys and JobFit are two products being piloted that will allow employers to prescreen candidates that have appropriate skill levels for the jobs that need to be filled. Additionally, this fee for service program will allow employers to identify skills gaps of current employees and help to build training programs that will bridge the gap between skills that are present versus what is needed.

The Fee For Service program's purpose is to offer enhanced service to businesses while giving the Workforce Development Board the capability to create additional monies to help support the WDA 6 system. All Fee For Service activities that generate income will be transferred to the OSO and placed with program and infrastructure monies that are managed by the OSO.

Other Sources of Income

The third tier of funding the WDB seeks to establish is in the form of charitable contributions by individuals, corporations, wills, trusts and other private sources to IRS – recognized Section 501c3 non-profit organizations. As a recognized 501c3 organization, the WDB will provide

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charitable donors with documentation of its tax-exempt status so private donors will be able to claim such contributions as charitable contributions on federal income tax returns or for other purposes.

The NCWWDB will attempt to obtain conditionally restricted revenue from private foundations by identifying those foundations whose funding preferences are compatible with the mission statement of the NCWWDB. If necessary, the NCWWDB will hire or otherwise retain the services of grant writers to develop quality proposals to obtain such awards.

By employing this three-tiered funding strategy, the NCWWDB will be able to work toward developing alternative sources of funding to at least reduce the nearly total dependence on federal program funding that exists in PY 2005. At the same time, the NCWWDB will enhance its level of service and relevance to the business community and the several regional economic development organizations

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – The WDB used the dedicated Council of Workforce Investment resources for the completion of the Baldrige Express. Although the WDB did not have the participation they had hoped the results were used as part of the WDA's March 2006 Strategic Planning.

NAWDP Credentials - The WDB's Program Policy Committee decided to target their WIA service providers for the Council on Workforce Investment funded NAWDP credentialing. The committee chose to pay one full year membership to NAWDP for every case manager of their WIA adult, dislocated worker and youth programs. The NAWDP credential application fee will be covered on a first serve basis until the money is gone with a deadline of 05/31/06. The NAWDP application must be submitted to the Board office with a cover letter of support from the case manager's supervisor. The Board goal is for 65% of their WIA case managers and Job Center staff to obtain the NAWDP credential by 06/30/07.

Financial Literacy

There is a variety of financial literacy educational programming activities being carried out in WDA 6. Some of their larger job centers are holding financial literacy workshops on-site, while others make referrals to the local UW-Extension and utilize the MoneySmart Program. Many WIA case managers are utilizing the MoneySkills website. Dislocated Workers Program case managers work with the Rapid Response teams to be sure that financial education and planning is addressed through the process. Recently, some Job Center staff, along with the WIA Program Coordinator, participated in the financial literacy webinar sponsored by DWD.

Youth Financial Literacy – Some of the WIA Youth Program case managers are working with their participants' local education agency in getting them connected with financial literacy educational programming. One WIA youth provider is co-located within a technical college/alternative high school that has financial literacy built into the current curriculum.

Financial Referrals – If financial planning is not provided, the case managers will utilize other community resources such as the MoneySmart program through the UW-Extension.

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WDA # 7 Northwest Wisconsin Counties of Ashland, Bayfield, Burnett, Douglas, Iron, Price, Rusk, Sawyer, Taylor and Washburn

One-Stop Operator Designation

OSO consortium (Job Service, Northwest CEP, DVR, Northwest W-2 agencies, Wisconsin Indianhead Technical College, North Central Technical College, Superior Vocations Center). Non-competitive – OSO designated by the WIB.

Fees for Service

Currently WDA #7 offers a number of business services for a fee. The WIB Business Development Committee has provided direction to the local Business Service teams to continue to develop and expand the fee-for-service structure for employers. The WDA will continue to offer the following services as well as explore other potential fee-for-service opportunities. At this time, the following activities are:

- JobFit System – virtual human resources department and personal assessment to match with available jobs online
- Customized Job Descriptions – clarify employee expectations, improve productivity and are an asset in legal proceedings involving personnel
- Organizational Charts – contain vital company information, concisely and visually
- Performance Based Evaluation Systems – create an objective method for setting wages, increase motivation and productivity, simplify reviews and create a written record for personnel files
- Organizational Policy Handbooks – communicate rules and expectations and are instrumental in litigation and personnel management
- Gap Analysis – helps reach business goals by determining what performance-inhibiting issues exist and presenting alternatives for change
- Customized Training - developed to meet the needs of the individual business in a variety of subjects and includes customized e-training
- Customized Workshops - face-to-face workshops that address the specific aspects of a business and their individual needs
- Immediate help during business openings/expansions
- Immediate help during layoff/downsizing
- E-Training – Development of online customized training modules for employers to use with incumbent workers.

Fees for Business Services. Each Business Services Team will identify in the Business Services Plan at least one business service that conforms to the WDA fee for services policy/plan.

Other Sources of Income

WDA #7 will continue to seek out additional resources from public and private entities. This includes private foundations, economic development agencies, and educational institutions. These additional resources will be targeted at strategic partnerships and efforts in order to establish long-term resource generation.

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The OSO will continue to identify current and potential resources and in-kind contributions from all partner agencies; stakeholders; community based organizations; and other public and private sources. Additionally the OSO will continue identifying any gaps, weaknesses or inequities in the current Job Center funding structures by effecting local resource sharing agreements and cost allocation plans. A plan will be developed with long-term funding options and presented to the WIB, for sustainable and equitable funding of the Job Center system.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – The WDB did elect to take advantage of the funds provided by CWI for the Baldrige Express Self-Assessment. The Board members and stakeholders started the process in January and completed in early February. The 2006 Leadership Assessment Performance Indicator Feedback Report was recently received and will be reviewed by the Board for further action.

NAWDP Credentials – The Customer Service Specialists, Employment Specialists, and other Job Center staff will be targeted for credentialing first. The credentialing process has begun and staff will continue to work toward credentials.

Financial Literacy

Financial literacy educational programming is currently offered to WIA participants who wish to take the e-training course Budgeting and Saving. This course addresses the following topics: Confronting Debt; Eliminating Debt; Banking Basics; Choosing Bank Accounts; Planning Your Retirement; Making 401(k) Plans Work; Exploring Investment Options. This curriculum is available at any time via the internet and is a 21-hour course. Also available in some of the Job Centers is a UW-Extension curriculum that is utilized by the W-2 program. This curriculum is available to W-2 participants.

Youth Financial Literacy – The interactive DVD provided by DWD will also be played for Youth during financial literacy workshops. No separate programs for youth are listed.

Financial Referrals – The Job Center Financial Literacy team will decide on which outside resources to develop a relationship with and will develop an assessment procedure to ensure quality referrals. The Job Center will use the DVD Resource Contact Booklet, which is aligned with the DVD, to provide referral resources to customers. The MoneySmart FDIC program will also be offered on e-learning as a resource for training as well as MoneySkills. Youth education curriculum will be investigated by the local team. The Job Center will keep an updated list of resources that clients can use to investigate their credit ratings, such as www.annualcreditreport.com. Credit rehabilitation counseling referrals will be made to Licensed Wisconsin Debt Service Adjustment Companies as found at www.wdfi.org.

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WDA #8 West Central Counties of Barron, Chippewa, Clark, Dunn, Eau Claire, Pepin, Pierce, Polk and St. Croix

One-Stop Operator Designation

Single regional OSO model; Workforce Resource as the designated lead agency and fiscal agent.

Fees for Service

Develop revenue generation mechanisms, including fee-for-service strategies to secure resources necessary to meet regional workforce development needs from private and public sources and advocate for allocation of resources to the region to address those needs.

More intensive services are provided on individual agency basis depending on staff availability and funding source guidelines. Some fee-for-service activities are being conducted to provide more intensive services. Such services tend to be concentrated on more intensive recruitment and employee screening services.

As a means to acquire resources beyond traditional governmental support to maintain and expand services to its employer and job seeker customers and supporting the right of other partner agencies, the Workforce Development Board passed a Fee-For Service Resolution in 1997. This structure assists in integrating various Fee-For-Service activities that may be conducted within the context of the Job Center network and does not preclude Job Center partner agencies from conducting allowable, independent services.

WRI business Services Coordinators Develop a Fee-for-Service Proposal Summary and draft Fee-for-Service Agreements with numerous employers and partners in the WDA. The Operations Manager and the Director of Administration reviews the documents. The approved documents are forwarded to the Executive Director or designee for final approval.

Current WRI Fee for Services Contracts:

Barron Area Schools	School Supervised Work Experience
Unity High School	School Supervised Work Experience
Menomonie Area School Dist.	Employee Recruitment and Screening
CESA	
DVR	JSS, Training and Placement Services, Payroll Services
Polk County Community Referral Agency	Professional Counseling and Career Training
St. Croix County Jail	Employment Readiness Project
Western Wisconsin Energy Cooperative	Employee Recruitment and Screening
Clark, Dunn, Pepin Dept. of Human Services	FSET Employment and Training Services
Polk County Dept. of Human Services	W-2/FSET Professional Counseling and Career Training

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Other Sources of Income

Develop revenue generation mechanisms, including fee-for-service strategies to secure resources necessary to meet regional workforce development needs from private and public sources and advocate for allocation of resources to the region to address those needs.

The Board subsequently integrated its planning efforts with those of the Regional Education Consortium and began a process that leads to an annual conference on regional development issues. This process has been expanded to include economic development, local government and community development sectors to facilitate comprehensive strategic planning around each of these sectors. The Workforce Development Board was authorized to be the convening entity for this “Synergy” process by the County Boards’ Consortium. This effort led to the successful effort to acquire resources to support this initiative through University of Wisconsin System Cross Divisional grant funds and GROW Grant funds from the Council on Workforce Investment. The goal is to have a comprehensive strategic development plan for the region to be introduced at the September 2006 Synergy Conference.

The WRI, Executive Director and Resource Development Manager assess the organizational and regional resource needs and identify potential public and private sources or resource assistance, develop applications for assistance and monitor progress in resource acquisition. This is done in keeping with Goal 3 of the Comprehensive Strategic Plan. The organization has been successful in securing other resources that have been utilized to support Job Center Efforts. The Workforce Development Board will encourage other partner entities to put forth similar efforts to secure resources to sustain the Workforce Development System.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – The West Central Wisconsin Workforce Area system operates under Baldrige principles of Continuous Quality Improvement. As such the WCWDA is a data driven structure that makes use of all sources of information relevant to setting and achieving goals. Any deficiencies noted through customer feedback, DWD monitoring, Fact Finding, audits and internal reviews are viewed as opportunities for improvement. Such process will also be utilized to identify “best practices” which can be replicated and utilized to assist with program improvement. The West Central Workforce Development Board will participate in the Baldrige Express assessment process between its March 2006 and June 2006 Quarterly meetings.

NAWDP Credentials – Workforce Resource, Inc. has been charged with addressing the staff credentialing process. As such it has already contributed nearly \$15,000 to this process and will utilize the \$2,000 CWI grant to assist in its efforts. Initial emphasis has been applied to aiding staff in attaining certification through the attainment of competencies and certifications through the Dynamic Works Credentialing process. Dynamic Works provides an online professional development training curriculum that provides self-paced and live, real-time, online learning, distance learning, and on site learning opportunities and certification programs to workforce development professionals built around the competencies identified by the NAWDP.

WRI staff may utilize paid work time to train in their respective Dynamic Works program when it does not interfere with caseload management, Job Center coverage, etc. Workforce Resource computers, internet connections, etc., may also be utilized “after hours” for Dynamic Works training programs. Workforce Resource will utilize resources at its disposal to assist those interested in also attaining NAWDP certification. The Dynamic Works process was chosen of its

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knowledge/competency based approach which provides administration with measurable objectives for knowledge attainment as a foundation for service competency.

Financial Literacy

The financial literacy counseling offered at the various Job Centers throughout the WDA is tailored to meet the needs of individual customer's needs and learning styles. Each Job Center makes Financial Literacy Counseling available in a variety of formats, including:

CD: Money Smart – a self paced training program on banking and money management – 10 modules on such things as borrowing, how to choose and keep a checking account, why you should save money, credit cards, mortgages, etc.

Financial Literacy – a self paced training on all aspects of money handling

Internet: WisCareers budgeting/financial management section

Workshops: EOC offers workshops on budgeting – on an as-needed or by request basis

UW-Extension offers workshops on budgeting and financial management – on an as-needed, by request basis and in workshops conducted either at area Job Centers or other centrally located facilities throughout the WDA.

Written materials: Information is available in "Starting Over" – a booklet written by dislocated workers for dislocated workers – there is a section on budgeting and how to get through a layoff with limited finances.

Youth Financial Literacy – Summer Youth Program participants attend group workshops that include budgeting, credit management, checking accounts, etc.

Financial Referrals – Westconsin Credit Union and Royal Credit Union offer Fiscal Fitness workshops and are currently planning on-site workshops with at all Job Center sites within the WDA.

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WDA #9 – Western Wisconsin Counties of Buffalo, Trempealeau, Jackson, La Crosse, Monroe, Juneau, Vernon and Crawford

One-Stop Operator Designation

Workforce Connections as the OSO; local coordinating committees. Each CJC and Access Point of Service has a Local Collaborative Planning Team.

Fees for Service

The One-Stop Committee adopted the requirement that each local comprehensive center and its Access points of Service offer at least one business service for a fee. A list of possible fee-for-service activities was distributed to the leads at the One-Stop Committee on February 20, 2006. Many of the centers already provide several services; however each Local Collaborative Planning Team will formalize the services to offer and the process for doing so in the Business Services Plan.

The progress toward fee-for-services will be reported to the WDB through the One-Stop Committee.

Other Sources of Income

At the onset of WIA, the LEOs named Workforce Connections, Inc. as the administrative agent for WIA services. As such, the Planning Department seeks grant opportunities for additional resources to the system and to help fulfill the strategic key result areas. In the past several years federal, state and local grants have added additional resources to the system. This process will continue.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – Members of the WDB took the Baldrige Express Self-Assessment on December 19, 2005, at their regular meeting. The final report was received on March 2, 2006. The Executive Committee will analyze the report and develop action plans based on the recommendations.

NAWDP Credentials – In the short run, the WDB will target case management staff for the adult and dislocated worker programs to be NAWDP certified. In the future the same will apply to youth case management staff..

Financial Literacy

A matrix which outlines financial literacy services provided by each center, the workshops at the centers and referral services was developed. These budgeting, credit and tax assistance workshops are provided on a regular schedule. The schedule depends upon the center, however all workshop schedules at the center are posted in the resource room.

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Youth Financial Literacy – Federal Deposit Insurance Corporation (FDIC) workshops on financial training are provided for youth at Jackson County and Juneau County job centers. FDIC curriculum is also used with youth at Jackson County Job Center.

Financial Referrals – The WDB makes various referrals for financial literacy services including referrals to UW-Extension, Catholic Charities, local financial institutes, Credit Counseling Center, Western Dairyland, County Aging Department, and Wisconsin Employment Transportation Assistance Program.

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WDA # 10 – South Central Wisconsin Counties of Columbia, Dane, Dodge, Marquette, Jefferson and Sauk

One-Stop Operator Designation

Noncompetitive Business Plan model to designate the OSO. One Stop Operator Consortium with 3 OSOs – Dane County, Jefferson/Dodge County, Sauk County/Columbia-Marquette. Specifics will be addressed in the associated CJC Business Plan and MOU submitted by 7/1/06.

Fees for Service

The Workforce Development Board is holding a strategic planning session on April 10, 2006, with One Stop Operators, current Business Services Team leaders, Director of Madison Area Technical College Business and Industry Division and Workforce Development Board members who have experience with fee-based and entrepreneurial approaches to business development to make recommendations on the best package of fee-based Business Services to launch in 2006. At this point, areas under consideration are:

- Distance learning based training offered from the Comprehensive Center location to incumbent workers of Industry Partnership and high growth, high demand companies.
- Packaging of Strategic Advantage data as a planning tool for business.
- Packaged customized industry based training to meet the need to support the entry, retention and advancement of unemployed and incumbent workers into high wage, high growth jobs.

Other Sources of Income

The process the Workforce Development Area will use to seek additional resources through grants, foundations, or private sources.

The WDBSCW staff will continue to seek grants from both public and private sources to support the Job Center System and also work to raise the capacity of Comprehensive Job Center staff to participate in our funding raising efforts. The Workforce Development Board is seeking membership in the Association of Fund Raising Executives with the goal of broadening its network to Foundations. We will maximize collaboration with partners to examine fund development options and continue to build the skill level of staff to seek grants from both public and private resources. The Workforce Development Board sets an annual fund raising goal as part of the budgeting process.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – The WDB completed the Baldrige Express survey on February 24, 2006. Analysis and strategies for improvement will be in place by July 1, 2006. The Board will be requesting funds from the State Council on Workforce Investment to expand the Baldrige Express survey to the Comprehensive Job Centers and their aligned Access Points of Service. The results will serve as the foundation to establish a quality improvement plan with the Job Center(s) Business Plan.

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NAWDP Credentials – The WDBSCW will target in 2006 – 2007 the WDBSCW staff and WIA Title 1 funded staff within the Comprehensive Job Centers, aligned Access Points of Service and Youth Contractors. This process will begin in April 2006. Our goal is that all WIA Title 1 funded staff have applied for and received feedback on their skill assessments by January 2007. Additionally the WDB plans to collaborate with all Comprehensive Job Center partners to support application for NAWP Credentials where appropriate.

Financial Literacy

Currently the WDB's Career Pathways Model incorporates a financial literacy module which was built based on curriculums developed by University of Wisconsin Extension and the National Association of Consumer Advocates. One model for financial literacy will be used through out the system for both youth and adults. As part of the Personnel Assessment stage of the Career Pathway – customers will be asked to assess their personal financial literacy. The intensity of each customer's participation in financial literacy programming will be based on the personal assessment and guidance from Job Center based case.

Module Title - MANAGING MULTIPLE PRIORITIES – 3 hours

Purpose – Going back to school can be very difficult for some adults. This workshop includes: (1) Time and stress management component to assists participants to truly understanding the commitment they are making to their future. (2) Financial aid component stresses the importance of budgeting to ensure that students can afford their schooling. Students analyze their own budget in preparation for filing for financial aid. Students are assisted with filing for financial aid. Financial aid application is required for all participants going into any financial aid eligible training supported by Workforce Investment Act funds. Once the FAFSA form is completed, the WDBSCW becomes a supplemental/gap funding source which frees up tremendous resources so that more participants can be funded. Completion of the FAFSA form also greatly enhances the possibility of increasing federal aid to our local post secondary institutions for subsequent years. The outcome is that students will be well informed and positioned financially to ensure their success in technical training. They will also have considered personal management tools to adapt to recent changes. The WDB's goal is to expand financial literacy education into the workshop structure of their Comprehensive Job Centers by utilizing the DWD interactive DVD to provide content. Our audience will be all Job Center customers – unemployed adults, youth, dislocated workers and incumbent workers.

Youth Financial Literacy – Youth is one of the audiences the WDB plans to target when using the financial literacy DVD that is being provided by DWD.

Financial Referrals – The WDBSCW has established a referral network to credit counseling providers in the region who are willing to assist participants who need to evaluate their financial position.

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WDA #11 - Southwest Counties of Richland, Grant, Iowa, Lafayette, Green and Rock

One-Stop Operator Designation

SWWDB will continue as OSO.

Fees for Service

Improve the financial viability of the workforce development system through fee for service initiatives, the pursuit of non-traditional funding, and waivers for incumbent worker training.

Develop and implement fee for service structure for use with business clients by 7/1/06. System criteria will be developed by Director of Business Services with input from the Business services team. This fee for service structure will be shared with Job Center staff with implementation during the 2006 program year.

They will also have access to the latest economic and labor market information, employer workshop offerings, and fee for service information. This new fee for service component should greatly enhance the services offered to local businesses, particularly in the rural areas of the WDA where few fee for service options are available. The Fee for Service schedule will be based on employer surveys which identified services that they do not have access to currently, and would be willing to pay for.

The Southwest WDA currently offers leased employee services to Grant, Green, Iowa, Richland and Rock counties as well as the Southwest Community Action Program on a contracted fee basis. This arrangement has increased cash flow for the Agency Administration area by 7%, and is a business service that will continue to be offered to interested entities.

A fee for service menu was developed by the Director of Business Services. The Business Service Team has been established and currently meets monthly. Performance expectations will be designated for each member of the team. The Director of Business Services will work with the Business Services Team and will schedule regular visits with Business Service Representatives throughout the WDA as they call on employers. The expectation is to generate at least \$10,000 of fee for Service revenue within the first fiscal year. Fee for Service selections will include such items as Microsoft Office computer testing, performing background and reference checks on candidates for positions, providing on-site training needs currently not being performed by the Technical colleges, and Personnel Policy development and updates.

Other Sources of Income

Aggressively pursue Federal, State, and Foundation grant opportunities to increase resources within system. A minimum of 4 grants will be written for programs not currently used by the SWWDB by 6/30/07.

The Director of Program Operations and the Director of Business Services are charged with seeking out and securing additional monies through grant funding. Relationships will be established with the planning departments within the technical colleges within our districts to

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improve sharing of potential funding opportunities appropriate for workforce development issues. Management team meetings will also provide opportunities for partners to share and cooperate on proposal development. The Director of Program Operations and the Director of Business Services have experience in grant development and have been successful in securing grant funding.

Baldrige Self-Assessment/NAWDP

Baldrige Express Self-Assessment – The SWWDB is participating in the Baldrige Express Self-Assessment Process. Initial steps within this process involve the completion of the self-assessment instrument. Fifty Individuals representing a cross-section of the WDA completed the survey on March 3, 2006. Survey results will be compiled by DWD with results shared upon receipt. Action steps for process improvement will be developed and monitored throughout the year.

NAWDP Credentials – Within the WDA, all partnership staff and WDB staff have been encouraged to apply for NAWDP credential.

Financial Literacy

The UW-Extension in Iowa County has offered 2 Financial Literacy workshops at the Dodgeville Job Center covering the topics of budgeting and credit analysis. The Community Action organizations within our area also provide budgeting information as a component of the overall assessment of customers. The Southwest Wisconsin Community Action Program, as a partner in the Richland County Job Center, offers financial literacy workshops to clients as an initial step to program services. We intend to expand the financial literacy offerings to 4 additional sites within our WDA and expand the content to be more comprehensive in nature covering many aspects of budgeting and credit.

Youth Financial Literacy – No details were provided on separate programs offered for youth.

Financial Referrals – UW-Extension offers financial literacy/budgeting workshops at the Iowa County Job Center in Dodgeville. The Community Action organizations within the area also provide budgeting information as a component of the overall assessment of customers. Beginning July 1, 2006, job seeker customers will be asked to answer a few key financial questions as part of the General Information Form during initial contact with the Job Center. Customers in questionable financial standing will be provided information related to Financial Literacy. Workshops will be available quarterly or as needed at the Job Centers in Janesville, Monroe, Richland Center, Platteville, and Dodgeville. The workshops will explore various components related to the areas of budgeting and credit. Initial workshop providers will be from UW-Extension, Financial Institutions, CAP Services, and Consumer Credit/Family Services. Additional partners will be brought in as the needs of customers are identified. All customers will have access to financial literacy information via the Virtual Job Center through links to MoneySmart software, the American Banking Association, and other appropriate sites. WIA adult, older youth, and dislocated worker clients in questionable financial standing will be required to attend workshops as part of their overall package of services. All WIA clients will be encouraged to participate in financial literacy training opportunities.

By July 1, 2006, a menu of providers will be developed identifying credible agencies offering credit rehabilitation counseling services. Customers in need of such services will be provided

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this list and encouraged to make an appointment. Credit rehabilitation counseling personnel will be invited to offer counseling services at the local Job Centers if possible. The Credit Rehabilitation menu of providers will be given to all financial literacy workshop attendees.