

**Modifications to Wisconsin's Strategic Plan
Workforce Investment Act Title I
January 2005**

Workforce Investment Act Title I Strategic Plan

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I. Modification Development Process

A. Process and collaboration

The Department of Workforce Development (DWD), Bureau of Workforce Programs (BWP) solicited input for the Workforce Investment Act (WIA) Plan modification 30-day review and comment from the Workforce Development Board's business and labor representatives as well as the 11 Chief Local Elected Officials. The proposed Plan revision was also posted on the State WIA web-site, and available for written or oral comments at the November 10, 2004 Job Center Roundtable with 130 employment and training partner registrants. At the November 19, 2004 Council on Workforce Investment's (CWI) Executive Committee meeting, the CWI Liaison provided a brief overview and highlighted the major changes from the current Plan. The Plan was also provided to the DWD Equal Opportunity Officer for review, and compliance with the Methods of Administration. Finally, the BWP Director discussed the modifications with the Workforce Development Board's Directors at their regularly scheduled monthly meeting on November 3, 2004.

B. Comments and utilization

In general, there was positive feedback during the 30-day review and comment period. The overall message was the endorsement of the new "synergy" and renewed integration of the WIA Plan, the Governor's Plan and the Council on Workforce Investment. Specifically, one Workforce Development Board Director offered several suggestions:

- (1) Download ASSET to Workforce Development Area's (WDA) on a weekly basis. State response: BWP is working on the download process with the intent to implement it in this program year barring funding and other technical impediments.
- (2) Have a list-serve and on-line orientations for new WIA employees, and provide training sessions and state meetings via video conferencing. State response: BWP is already researching the details of these recommendations with the intent to implement them in this program year for training and information sessions.

The CWI's Executive Committee reviewed the comments from the 30-day review at their January 21, 2005 meeting. They unanimously endorsed the final Plan modification as presented.

[Comments from a partner Project Manager were outside the scope of the Plan modification but included: (1) redefining self-sufficiency and tailoring performance standards around critical indicators of job and family functioning; (2) funding targeted to high-risk populations with the County Board's taking a lead role for partner participation.]

II. State Vision and Goals Governor Doyle's Grow Wisconsin Plan

Governor Jim Doyle's Grow Wisconsin initiative has continued to drive our workforce development efforts as Wisconsin climbs out of the economic downturn of the past few years. In 2003, the focus was a growing recognition of the important linkages between economic development and workforce development. State and regional forums and summits were convened for joint conversations. The conversations ranged from

industry clusters to the creative economy – talk that typically focused on business and community development. The focus now is on the importance of having workforce development also at the table.

Targeted Industries: As part of Grow Wisconsin and the state's industry cluster efforts, some industries have been targeted for special emphasis to recognize growing skill and labor shortages. These include:

- Healthcare – In recognition of the growing healthcare workforce shortage crisis in Wisconsin, a Select Committee on Healthcare Workforce Development was established by the DWD Secretary.
This group of about 25 healthcare industry, labor, government and educational organizations meets quarterly to report on project progress in such areas as retention, recruitment, educational capacity, and data analysis.
- Construction – Efforts to grow a construction workforce are currently focused in the Milwaukee area as a result of several major development and transportation projects that will demand additional workers. This project involves developing new coordination strategies between the publicly funded workforce system and the private and philanthropic funding system. This currently involves DWD, the local Job Service office, the local workforce investment board, several Wisconsin Works (W-2) agencies, the Wisconsin Regional Training Partnership, and the area technical college.
- Manufacturing – DWD has been working with the state's technical college system to launch an Advanced Manufacturing Solutions project. Governor Doyle convened a Manufacturing Summit in October 8, 2003, to identify key needs that included strategic investment in training.

In the past year, new structures have been established at the state and local level. There is a Governor's Economic Growth Council (EGC), a group of business people that meet quarterly with the Governor to provide input on growing Wisconsin's economy. Several of the EGC members also serve on the CWI, including the Chair and Vice-Chair of the CWI. The EGC allows the opportunity for the CWI Chair to report on workforce investment efforts within the broader context of economic growth.

Office of Economic Advisors and Office of Economic Initiatives – In late 2003, the Office of Economic Advisors (OEA) was established within DWD to provide a sharper focus on the use of economic and labor market information for state and local decision-making. The state's chief economist is part of the steering committee for the CWI and also regularly advises the EGC. The OEA is also working with other state economists to identify key metrics for the state to measure its economic progress. The Office of Economic Initiatives was just recently established to create a small unit to focus on Grow Wisconsin targeted industries; work more closely with economic development; and, to potentially bring cross-program innovative strategies to the various workforce programs administered by DWD.

Regional – Two significant regional efforts were launched in the 2003-2004 period.

- Northeast Wisconsin Economic Community – Since mid-2003, this 17 counties and two WDAs, effort has brought together leaders to form three groups: a CEO

business development group; a workforce development group; and; a community development group. Their primary goals include a net increase in jobs and wages, and improvement in economic well being.

- Initiative for a Competitive Milwaukee (ICM) – Based on the Harvard-based Initiative for a Competitive Inner City (ICIC) model. The ICM was established in inner city Milwaukee within 11 zip codes in which 27% live in poverty, 35% are under 18 years of age, and in which lives Wisconsin's most diverse population with 50% African American, 30% White and 15% Latino. The focus is on both business and workforce development in the key sectors of healthcare, business services, construction, and advanced metal manufacturing.

III. B. 1. Leadership

a. Governor's Council on Workforce Investment

i. Organization and structure

In 2004, Wisconsin had the unique opportunity to form a completely new council due to a change in the Governor's office. The CWI was appointed in February 2004, and represents the required partners under WIA as well as other vital stakeholders in Wisconsin's employment and training arena. Governor Doyle reconstituted the CWI with 49 members, some of whom served on previous WIA State Councils. Membership of the newly created CWI includes: Majority of business representatives who are chief executive officers or with optimum policy-making hiring authority, three labor organization representatives and eight representatives from state agencies responsible for WIA partner programs and activities.

II. Organizations and entities represented

Specific organizations or entities represented on the Council: Local and State Chambers of Commerce, regional development corporations, State and local elected officials, University of Wisconsin faculty, United Migrant Opportunity Services, Esperanza Unida, Inc. and local technical college President. The State agencies represented include: Wisconsin Departments of Public Instruction, Corrections, Workforce Development, Health and Family Services, Commerce, Veterans Affairs, as well as the Technical College System Board and the Governor's Work-Based Learning Board. [Appendix A Complete CWI Membership]

CWI Organizational Structure

The Council has established four standing committees, each with specific responsibilities for advancing the Council's vision, mission, and overall leadership focus. These include the Emerging Opportunities Committee, the Current Workforce Committee, the Workforce System Design Committee and the Executive Committee.

The Emerging Opportunities Committee is charged with preparing for the future by identifying the workforce skill needs of emerging industries and preparing the workforce of tomorrow to obtain those skills. It is organizing its efforts around industry clusters and identifying high growth, emerging industries with potential for high wages and advancement.

The Current Workforce Committee is charged with supporting a changing workplace by identifying skill gaps on which to focus training and retraining resources and developing innovative strategies to address changes in the workplace. Also incorporating an industry cluster approach, this committee is focusing on activities to link education and workplace training more effectively and on developing strategies to assist incumbent workers. In addition, this Committee provides guidance and oversight to the WIA dislocated worker program and plans to consider policies for program improvement as well as review and funding recommendations on individual projects.

The Workforce System Design Committee is charged with ensuring State and regional success by targeting resources in key growth industries in different regions of the state and ensuring a comprehensive, effective and accountable workforce system to deliver education and training services to achieve the vision. Included within its focus areas is development of objectives and strategies for improving Wisconsin's Job Center system as well as planning and oversight of WIA Title I B programs. This Committee is currently obtaining feedback from the employment and training community to identify service delivery improvement needs. This information, in concert with Job Center improvement efforts occurring within DWD, will provide the basis for future CWI service delivery policy recommendations.

The CWI's Executive Committee provides leadership to the CWI as a whole as it works toward these efforts by establishing a strategic public-private partnership approach, using benchmarking and continuous improvement to measure progress and success, focusing on both short and long term goals, and ensuring a comprehensive approach to Wisconsin's workforce system. The Chair and Vice Chair of the Council are currently working with the DWD's OEAs and the Division of Workforce Solution's (DWS) Office of Economic Initiatives to identify metrics appropriate for measuring progress on the workforce investment related goals of the Governor and Council. Initial efforts under discussion include development of a "state report" on Wisconsin's workforce system that would include general measures on the state workforce, workforce system, and economy; special topics related to advancing the Governor's and CWI's workforce system vision, mission, and goals; and, system measures by which to measure progress in achieving state workforce investment system goals.

iii. Process used to identify Council members

The process used to identify Council members was a multi-faceted one. Initial appointments were identified by the Governor's Office during the overall gubernatorial process of appointments to numerous state councils and committees. Appointments to the state workforce council were made up of individuals that had identified an interest to the new Governor in the areas of education and training of Wisconsin's current and future workforce. These represented businesses from a wide range of sectors and also from around the state. Approximately 25 individuals were appointed during this phase. At the same time the public sector, or non-business members, were also being identified which would then guide how many business sector representatives would be needed. Business representatives were specifically sought from growth industry sectors such as technology and health care, two important industries that had not been well-represented on past councils. Diversity issues were considered for both geography and also racial representation to be reflective of Wisconsin's demographics. Workforce Development Board (WDB) Directors were asked to suggest names from areas and

sectors that were not adequately represented. We also looked for some overlap of state council members that served on local boards to enhance the connection between the state and local areas. As a result ten of the total forty-nine members also serve on local boards. The racial diversity that reflects our State include members from the Native American, Asian, Black (African-American), Hispanic and Latino communities. In fact, a Hmong businessperson has just been appointed to reflect the influx of 3600 Hmong families that will be arriving shortly in Wisconsin. In addition, effort was made to appoint economic development representatives to build more linkages between economic development and workforce development. While the CWI is a rather large body, the process used, and the wide range of individuals that have been appointed, will provide an opportunity to positively impact Wisconsin's workforce system for the future.

iv. Leadership by the Council

The new CWI is moving quickly to provide effective leadership to the workforce development system, which includes carrying out its responsibilities for the WIA. The CWI initiated its leadership role before its first meeting, when under the direction of the CWI Chair, DWD/DWS staff conducted a survey of members to identify their perceptions about the key issues related to development of Wisconsin's workforce and economy. At the same time, the Chair formed an Executive Taskforce to assist in organizing the CWI. The Taskforce was comprised of 12 CWI members representing the business, labor, education, private non-profit, and government sectors. The first CWI meeting in March 2004 focused on providing basic information on the Governor's plan to "Grow Wisconsin", the State's workforce development system and resources, and discussion of the critical workforce and economic development issues identified by CWI members. Following this first meeting, the Executive Taskforce worked together to define and determine priorities related to the key workforce issues facing the State.

This process has enabled the CWI to begin developing its policy framework, establish an organizational structure through which this framework can be refined, begin identifying the methods and linkages needed to provide the leadership and implement its policies and strategies system wide.

Policy Framework

As noted earlier at the outset of this Plan modification, the Governor's Grow Wisconsin Initiative is driving Wisconsin's workforce and economic development efforts. As the primary advisory body to the Governor on the "Invest in People" initiatives of Grow Wisconsin, the Governor has charged the CWI with several key roles.

- Promote the use of labor market information to ensure evidence-based policy recommendations to guide the state's workforce development system;
- Recommend policies to strategically target state training and education resources;
- Foster and support public/private partnerships and intergovernmental cooperation and coordination in building Wisconsin's workforce;
- Develop and implement initiatives that invest in Wisconsin's workforce and establish measures to monitor progress toward achieving objectives; and,
- Function as the federally required WIA state council to ensure that WIA funds are used as required by federal law, to support the workforce goals of the state, and to disperse state dislocated worker funds.

The CWI is working to translate the Governor's charge into specific policy direction for the State's workforce development system. Toward this end, the Council has developed its vision and mission [Appendix B]. Approved in May 2004, this policy focuses on both the future work of the Council and Wisconsin's workforce development system overall on "developing qualified workers for quality jobs." To advance its vision, the CWI is committed to providing strategic leadership to support the Governor's Grow Wisconsin plan by:

- increasing education, skills and wages;
- focusing on the future economy;
- making smart and strategic regional decisions; and
- fostering entrepreneurship.

The CWI is in the process of building on its vision and mission through its committee structure. Each committee is expected to develop objectives/activities and metrics in support of the Council's vision and mission. These will be incorporated into the vision and mission statement to provide the overall strategic plan for advancing the Governor's Grow Wisconsin "Investing in People" initiative. This strategic direction is expected to be incorporated into policy guidelines applicable to WDB's WIA plan modifications, and where appropriate, Job Centers. In addition, the CWI has had preliminary discussions about developing a more coordinated approach to planning across state agencies, and expects to work more directly on this effort in the coming year. Through these discussions, the CWI expects to consider how the CWI's vision, mission and goals can be used as a foundation for integrated planning across state administered workforce development programs, as well as economic development programs where applicable.

The CWI's leadership role will be supported by a new Executive Order, which was recommended by the CWI in September and is currently under consideration by the Governor. [Attachment C] It gives the CWI responsibility for advising the Governor on statewide workforce investment policies and strategies and serving as the vehicle for State and local interagency cooperation in developing Wisconsin's workforce, in addition to its traditional responsibilities for carrying out responsibilities for WIA specified in WIA legislation.

Finally, the CWI is engaged in review and comment on State-level program plans to identify how these plans can advance the Governor's and CWI's goals for Wisconsin's employment and training system. To date, this activity has resulted in review and comment, and recommendations of support for two federal grants: a State grant proposal from the Wisconsin's Department of Health and Family Services to the U.S. Department of Health and Family Services for Wisconsin's Medicaid Infrastructure Grant (MIG); and, the DWD plan required by the U.S. Department of Labor (DOL) for Wisconsin's Labor Market Information One-Stop grant.

Linkages

The membership of the CWI provides opportunities for important linkages that will promote the leadership role of the CWI at both the state and local levels, as well as within key groups, including business. The Chair and Vice Chair of the Council are members of the Governor's Economic Growth Council, a group of business people that meet quarterly with the Governor to provide input on growing Wisconsin's economy. Membership on this group allows the Chair to report on workforce investment efforts

within the broader context of economic growth. Several of the members are also private sector members of local WDBs, which will promote more effective communication between the state and local levels. The CWI members also include the heads of the State agencies with the most direct responsibilities for workforce and economic development programs administered by the state. This provides an effective forum for ensuring effective communication across state agencies and with the Council as a whole. This ensures that the CWI as a whole is informed about State issues and initiatives and that State leaders are knowledgeable about and can provide leadership to advance CWI State workforce policies within their agency programs.

The CWI is also providing leadership through linkages with specific program activities. For example, a sub-committee of the Executive Committee will be created to serve as an advisory group for the MIG noted above. This subcommittee will include from three to five CWI members in addition to individuals representing people with disabilities and others.

Finally, the CWI is supporting the creation of a state agency interagency coordination group that would serve to improve coordination of State agency workforce development efforts. While this interagency group will not be directly attached to the CWI, it will include decision-makers from the key state agencies that are represented on the CWI. This will offer a mechanism to advance and more effectively implement activities related to the Governor's Grow Wisconsin plan and the related CWI vision, mission, and goals, including coordinated planning, and the targeting and sharing of resources.

v. Coordination with Workforce Development Boards

As previously noted, the WDB Directors were solicited for nominees for the Governor's consideration. As a result, also stated above, ten of the 49 members of the CWI serve on WDBs throughout the State, including the CWI Chair. This has allowed direct, hands-on coordination with WDA activities. At DWD's request to serve as a local resource at all CWI Committee meetings, each WDB Director has identified a standing Committee for regular attendance. Finally, the Workforce System Design Committee is specifically charged with the following goals related to coordination with the WDBs: "Establish a consistent, two-way communication system with WDBs", and "Seek input from WDBs for continuous improvement to meet employer's and job seeker's needs." In fact, that Committee is holding a listening session at the November 10, 2004 DWD Job Center Roundtable, and conducting their regular meeting also at that site.

vi. Public access to meetings and information

The records of the CWI are open and accessible to the public including persons with disabilities in compliance with the Americans with Disabilities Act and the Rehabilitation Act of 1973. Full Council and all Committee materials and meeting notices are available on their web-site <http://www.wi-cwi.org>. In addition, all meetings will be held in accessible facilities, and proper notice of these meetings will adhere to open meeting laws.

vii. Conflict of interest

Conflict of interest is generally understood to exist where a person has a direct personal, organizational or financial tie to an organization, and where that person is in a position to influence, or appears to influence the actions of another organization for the

benefit of themselves, immediate family members, or an organization with which they have such ties. State statute further specifies conflict-of-interest prohibitions.

V. Performance Management

Corrective Action Plan for Program Year (PY) 01- 02 Adult Earnings Change Measure

WIA Required State Measure: "Earnings received in unsubsidized employment six months after entry into the employment."	PY 01 Negotiated Standard \$ 3,786	PY 01 Actual Performance \$ 2,105
"Earnings received in unsubsidized employment six months after entry into the employment."	PY 02 Negotiated Standard \$ 2,900	PY 02 Actual Performance \$ 2,279

E. Sanctions and Technical Assistance

i. Identification of the cause for failed performance

Wisconsin's December 2001 WIA Annual Report shows that the State failed to achieve 80% of its negotiated performance level for the Adult Earnings Change Measure. No corrective action plan was required by U.S. DOL for PY 01. There were two factors that influenced the initial performance results in PY 01 and PY 02. DWD determined that there was a calculation error in the measure. The State also noted that the lack of Wage Record Interchange System (WRIS) data from Illinois lowered the State's performance for this measure. Employment and Training Administration (ETA) staff assisted the State in obtaining Illinois wage data in May 2004. When the wage data was added to the existing performance data, and the measure was recalculated, the State performance increased to \$2,420 which was sufficient to demonstrate that Wisconsin did not fail this performance measure in PY 02. DWD's revised data analyzed by ETA resulted in the State not being financially sanctioned.

Baseline Data

Prior to PY 03, the State did not use supplemental data sources. Any participant not found in the Unemployment Insurance (UI) wage record was reported as unemployed, and was included in the earnings change denominator. This over-reported the number of individuals, which in turn reduced the amount of the average earnings change. In PY 01, WRIS data was not available from several neighboring states which effectively eliminated data that could have assisted the State in reaching the performance level. As of October 1, 2004, Michigan does not participate in WRIS, and Illinois wage data is still not available through WRIS. However, Wisconsin will continue to obtain UI wage data from Illinois through the existing data sharing agreement until the State's WRIS technical difficulties are resolved. PY 03 cross-matches with WRIS show that the largest numbers, over 700 total, came from Minnesota and six other states that do not directly border Wisconsin.

An extensive data file review of the Adult Earnings Change Measure was conducted to identify issues associated with Wisconsin's failure to meet the State's goals for adult earnings gain, and the potential impact of using supplemental earnings as a method for measurement in addition to UI wage data. This assessment revealed that Wisconsin

was failing to account for a significant number of positive outcomes of participants who exited the Wisconsin program, but were not in UI-covered employment. As a result of this assessment, Wisconsin implemented a new policy and guidelines for using supplemental wage data in addition to UI wage data to calculate employment-related performance outcomes, including wage changes.

Division of Workforce Solutions (DWS) performance policy staff also conducted quarterly reviews of PY 01-02 ASSET data and case files to identify issues that negatively affected performance measures. These reviews revealed a number of case management practices, misunderstandings about performance measures and how results were derived, data entry weaknesses, and other issues that were detrimental to state and local performance results. Problem areas common across Workforce Development Areas (WDAs), and methods/strategies for addressing them, were incorporated into various PY03 technical assistance and training efforts developed to enhance WIA performance outcomes. The findings also provided the basis for individualized technical assistance to WDAs.

Changes in Economic Conditions

At the time of the initial performance negotiations, the downward spiral of Wisconsin's economy was underestimated in terms of its effect on future performance results. For the period of PY 00-01, Wisconsin experienced a heavy and persistent recession in the manufacturing sector, with an average loss of over 20,000 jobs per month. Given the State's job market reliance on manufacturing, this sector's substantial decline had a major negative impact on employment and training opportunities. Secondly, manufacturing provided the highest wage level to workers of any of the State's major employment sectors which had a direct causal effect on attaining performance goals.

A historical perspective reveals the significant economic impact that clearly affected performance for the Adult Earnings Change Measure for PY 01 and 02. For most of the 1990s, manufacturing made up over 22 percent of the State's total job market. For the first ten months of 2002, manufacturing had dropped to 19.7 percent of the State's total job market. In the period of 1990 through 2001, Wisconsin had an average monthly unemployment total of 116,700, based on a labor force of 2,821,000 for an average unemployment rate of 4.1 percent. In 2002, the State's average unemployment rate was 167,761 which stands out as the highest level of unemployment for the State since the mid-1980s. Claims for unemployment insurance for the State had been fifty percent higher for the past two years than they were in prior years.

The construction industry had also seen some employment losses, particularly in heavy construction. That sector reported a 5,000 job per month reduction between July 1, 2001 through June 30, 2002. Heavy construction employment activity is usually based on private industry investment in plans and government construction projects both of which reduced growth. Other sectors that had major downturns with job losses included the retail trade, transportation, warehousing and public utilities. Retail trade alone lost over 10,000 jobs in PY 01 and another 4,000 jobs in PY 02.

Overall, after eight years of growth and dynamic activity in its labor markets, Wisconsin's job market was hard hit in PY 01 and 02. Before this two-year period, the

State had not previously experienced two successive program years of decreasing job totals.

i. The State's proposed remedy to address the cause

A Technical Assistance Team was created in DWS to identify areas that needed to be addressed for improved performance results. Topic areas, target audiences, methods of delivery, activities for technical assistance and training providers, estimated costs and target dates were identified. DWS staff conducted an analysis of WDA performance issues to identify non-Automated System Support for Employment and Training (ASSET) issues that included reviews of monitoring reports, ASSET data, and other information available at the State level. After considerable discussion among DWS policy and training staff, the Local Program Liaisons (LPLs) and the WDB Directors, a state-wide performance enhancement strategy was implemented.

The State's Corrective Action Plan for PY 01-02 consists of the following elements: State-wide training for WIA staff to address common issues across multiple WDAs related to poor performance, and enhanced skills training for case managers; ASSET technical assistance and training for WIA staff, and ASSET system redesigns; development of a plan for continual training and technical assistance for WIA staff; WDAs' corrective action plans including a self-assessment; and, issuance of State policies.

The Corrective Action Plan was implemented in order to improve performance results for the adults earnings change measure. The following activities have already been successfully completed. [Attachment # 15 charts the complete list of State activities and the current status].

State-wide Training

Wisconsin Incentive Awards and Technical Assistance and Training (TAT): Wisconsin allocated \$300,000 of PY 03 funds for incentive awards for WDAs that met or exceeded all PY 02 WIA performance standards, and to support statewide and local TAT efforts. One WDA, Northwest Wisconsin, received an incentive award of \$28,370. No WDA had qualified for incentive awards in PY 01.

WIA Enhanced Case Management Skills Training:

Four, two-day workshops were delivered around the state in February and March of 2004. The training was developed and delivered by a Wisconsin-based training provider, Kaiser Group. A total of 126 participants attended the workshops. The program was targeted to WIA Adult and Dislocated Worker case managers, however, several WIA youth program case managers also attended. The overwhelming majority of completed evaluations rated the training as either outstanding or highly successful.

WIA Performance Standards Conference:

This training was delivered March 23-25, 2004 in Madison. The two and one-half-day training conference included three separate workshops:

1. WIA Performance Standards for Adults and Dislocated Workers programs;
2. WIA Performance Standards for Older and Younger Youth programs; and
3. ASSET System.

The two-day performance standards sessions were developed and delivered by Social Policy Research Associates (SPRA); the third half-day ASSET System session was developed and delivered by DWD/DWS staff. There were 193 participants at the conference. Attendees included WDB Executive Directors, WDB management staff, case managers, subcontractor staff and state and federal staff. All participants received a materials notebook that included performance and related reference information on the WIA adults, dislocated workers and youth programs. Conference evaluations indicated that the training was a success, with participants indicating the sessions were highly useful.

Business Relations Emphasis:

Two Business Relations Group Symposia were held with 236 participants representing all 11 WDAs. In addition to WDB Directors and key staff, Job Center Managers and lead staff, Job Service District Directors, Vocational Rehabilitation District Directors and private partners were in attendance. Participants heard presentations on the "Power of E 3," "A Demand Driven Workforce System" and "Job Development Strategies." The event also kicked off a new Business Resource Group Mail Distribution List-SERV and provided a Business Relations Tool Kit to attendees.

WIA Worker Training Web Site:

An internet-based technical assistance and training resource was created for new and existing staff working on the WIA Title I programs: adults, dislocated workers, and youth. This site, <http://dwd.wisconsin.gov/dwspts/resourcewebs/wia/default.htm>, was developed to provide WIA program staff with one source for their technical assistance and training needs. The web site target audience is field staff, primarily case managers, and workforce development board staff. There are three key content areas on the web site: (1) ASSET and reporting system functionality; (2) WIA Performance Management, and; (3) Case Management. The WIA Worker Training web site is presently being field tested. Feedback from the field testers will be incorporated on the site in the next few months.

ASSET

In PY 01 and 02, performance outcomes were adversely affected by transitional program reporting requirements, and information technology system setbacks that inhibited State staff's ability to provide quality participant and program data to the WDBs. This was the "pre-engineered ASSET" period. In PY 03, DWS added functionality to the ASSET data collection system to improve the ease and accuracy of program reporting as well as the quality of existing data in the system. The improvements have already lowered error rates as demonstrated through the Data Validation project, and continuously improved performance results.

DWS took positive steps to remedy the original (G*STARS) reporting system that failed to meet expectations as a case management tool and management reporting system. The first phase was to provide local agencies with better information through a web-based job center systems data warehouse that provides raw data about program registration, services, and exits from ASSET. The data warehouse was implemented in November 2002, with the expectation that this information might assist local agencies to better manage programs. While providing some success, it was evident that the G*STARS system flaws contributed to the poor quality of data. As a result, DWD

replaced that system in April 2003 with a new case management system that resolved the issues of system instability, unavailability and data integrity.

The new system, ASSET, has features and edits that prevent workers from omitting data that are necessary for federal reporting and performance calculations. Additionally, the new system provides greater functionality, such as on-line caseload reports, an on-line User's Manual that provides workers with a resource about system usage and field definitions, Individual Training Account tracking and evaluation, faster reporting of same service to multiple customers, and an on-line Employment Plan. The system is stable and robust, and DWS has received positive feedback from system users.

These multiple system changes magnified the State's performance measures because of several factors, including:

- (1) Data for the PY 01 and PY 02 measures had to be extracted from three computer systems. Because only active participants were carried forward to the G*STARS system, many exiters covered by these time parameters had data only on the legacy systems. The extensive programming needed to accomplish the task of combining this data with the information from the new system redirected limited resources from making system improvements;
- (2) Decentralized input of information: With the implementation of G*STARS, workers for the first time were responsible for entering and updating the case records. Insufficient training in advance of implementation for a transitioning program resulted in incomplete or inaccurate reporting of registrations and services; and,
- (3) The G*STARS system was untested and unstable. G*STARS, from the first day of operation, had technical issues that frequently resulted in system unavailability for workers. The computer system lacked documentation so that key input fields that affected performance were often misunderstood or omitted. The system lacked edit checks to prevent workers from making keying errors, and several important fields were not standardized or consistent with Federal and State policies. These problems, coupled with difficulties in keeping the system available to workers, resulted in poor data quality and reliability. This is the context from which the PY 01 and PY 02 data was extracted for the WISARD and the performance calculations.

ASSET improvements that correct the deficiencies noted above include:

- On-line caseload tracking reports;
- On-line audit trail for changed data in the system;
- On-line Individual Employability Plan for all participants;
- Features that allow workers to enter a case note or service provided for several individuals at one time;
- On-line tracking for Individual Training Accounts and outcomes that allow for evaluation of the program and training providers; and,
- Data warehouse expansion to include locally requested WIA program management reports.

Finally, improved communications between the ASSET users, State program staff and WDB staff has occurred via the ASSET User Group chaired by a local WDB staff person. This group provides guidance to local agencies about using the system, and

establishes a forum for discussion about future enhancements. The User group was charged to quickly identify problems, agree on corrective strategies, and then implement the solutions; and, identify and assist in the creation of management reports needed by local areas. DWS staff have conducted technical assistance visits to WDAs to meet with workers who use the system, and help them better understand the relationship between their system documentation and performance outcomes.

WDB assessment, analyses and local corrective action plans

As stated earlier, performance and policy staff along with LPLs conducted extensive reviews of data and case files to identify factors that may have impacted on meeting the performance measure standard. Issues identified for individual WDAs included regional economic conditions and participant and employer characteristics that may have required a more immediate change in service strategies. BWP policy staff and LPLs established a WDB Self-Assessment Survey as part of the individual WDB's Corrective Action Plans. This four-month process helped identify specific performance problem areas and technical assistance and training needs. The LPLs also revised their on-site monitoring instrument to include areas pertinent to these issues, and the WDBs modified their local plans accordingly.

State Policies

The above discussions and survey results also identified State policies that needed to be developed or revised to assist the WDBs. The following State policies that could have some positive influence on improved Adult Earnings Change Measure were issued:

- Supplemental Wage Data Policy: In order to most accurately reflect the participants successfully served, and appropriately counted for the Adult Earnings Change Measure, DWD implemented a new policy on supplemental income data. It allows the WDBs to use specified supplemental wage data with required verification. [Attachment # 16]
- Follow-up Services Policy Revision: In order to emphasize the critical need for some participants to have follow-up services for their successful WIA program completion, DWD revised the State's follow-up policy that included additional examples and clarified allowable activities. [Attachment # 17]
- Data Correction Request Policy: Addresses general guidelines and policies under which data entry errors can be corrected, and the procedures for making those corrections. [Attachment # 18]

Continued Efforts

The completed activities above will be augmented in the following areas:

- Ongoing ASSET on-site technical assistance and training;
- Continued expansion of the WIA Worker Training Web Site, including updating curricula as well as questions-and-answers from the field;
- Further refinements to ASSET via the regularly scheduled ASSET User Group; and
- On-site monitoring, technical assistance, and guidance for WDB service strategies.

A major additional training activity will take place in PY 04 that is outlined below.
Earnings and Career Advancement (Compressed Video) Symposium:

This one-day Symposium will be offered through compressed video at four state facilities: Eau Claire, Green Bay, Madison and Milwaukee. The goal of the videoconference is to improve Wisconsin's WIA earnings gain performance by increasing statewide knowledge on career and occupational resources, and state and regional projection data. This training will include;

- A. Identifying Wisconsin's growth industries and developing strategies to provide related skills upgrade training; and,
- B. Discussing strategies that lead to job advancement and increased earnings, such as mentoring, on-the-job training, skills and occupational certifications.

The target audience is business relations job center staff, WIA Title I program planners and managers, WIA Title I case management supervisors for adults and older youth programs. Key WIA Title I case managers were also invited to the videoconference, since the career and occupational resource information in the program would benefit their case management efforts.

Provider sources will include:

DWD and DWS staff

- ✓ Terry Ludeman, WI State Economist;
- ✓ Roger Gantzarow, DWD Director of Counseling and Testing;
- ✓ Karin Wells and Emily Camfield, Office of Economic Advisors; and,
- ✓ Office of Economic Advisors (Economists/Labor Market Analysts)
 - UW-Eau Claire - Bill Brockmiller and Beverly Gehrke
 - UW-Green Bay - Dick Seidemann
 - UW-Madison - Dan Barroilhet

ii. The anticipated outcomes for improved performance

The State anticipates meeting the Adult Earnings Change Measure standard in the future due to the following outcomes:

- Improvements in ASSET will significantly decrease error rates, and improve ongoing assessment of program performance; and
- Earnings are expected to be higher based on the anticipated upswing of the economy.

V. Performance Management

Corrective Action Plan for PY 02-03 Adult Employment and Credential Attainment

Performance Measure	Negotiated Standard	Actual Performance
Adult Employment and Credential Attainment	PY 02 61 %	PY 02 54.4 %
Adult Employment and Credential Attainment	PY 03 62 %	PY 03 42.9 %

E. Sanctions and Technical Assistance

i. Identification of the cause for failed performance

While the State failed the Adult Employment and Credential Attainment performance measure (*Adult Attainment of Educational or Occupational Skills Credential*), seven WDBs qualified for local performance incentive awards. In addition, Southwest WDB exceeded all 17 performance measures.

Baseline Data

Corrective action has already begun following initial data analysis. DWS produced a preliminary annual report 30 days prior to the October 1 submission date to allow local staff time to update and correct participant records. At that time, two WDBs were failing the measure: Fox Valley WDB and Milwaukee WDB. Both the State and the WDBs have a negotiated goal of 62%, which means a minimum of 49.6% is necessary to meet the 80% minimum required for success. Fox Valley's performance rested at 46.34%; Milwaukee was at 18.71%; and, the State's performance was 36.5%.

DWS staff performed a case-by-case review of all the participants contained in each WDB's performance measure denominator. In both WDBs, obvious reporting errors were identified and participant records corrected. Through those corrections, plus the infusion of PY 03 Illinois wage record data, Fox Valley was able to raise its performance to 55.3% when the annual report was submitted to DOL. Milwaukee was able to raise its performance to 26.8%, which was insufficient to meet the measure. These corrections also raised Wisconsin's performance to 42.9%, which is below the 80% minimum required to meet the measure.

Reporting errors are not the only factor in poor performance results. DWS credential policy allows WDBs to report credentials for five Intensive services that have training activities (basic skills and literacy activities, internships, work experience, pre-vocational services, and GED stand-alone), provided that the activities meet the training and reporting definitions contained in Federal and State guidelines. This policy, as interpreted to compute the performance measure, lacked flexibility and accommodation for local program design and service strategies, and had the unintended consequence of adding participants to the denominator who should not have been counted in the measure. DWS is making modifications to the reporting system to address this issue. WDBs will be permitted to request corrections for all participants who will be reported in

the PY 04 Adult Employment and Credential Attainment rate. This improvement, alone, is expected to significantly raise both state and local performance.

Changes in Economic Conditions

For a period of 44 months, including the 12 months of 2003, Wisconsin experienced a very troubling and persistent labor market recession, particularly in the manufacturing sector. The State saw an overall loss of some 55,000 jobs between the middle of 2001 through the end of 2003. Manufacturing employment experienced a loss of 88,000 jobs over that 44-month period. As the economy shows spurts of recovery, worker shortage problems then inflate the pressure for short and long-term training opportunities. Firms, especially manufacturing, will and have backed off in training, and yet they are about to be hit by large numbers of retiring workers as baby boomers reach retirement age. The Governor's Grow Wisconsin Initiative has allowed the State to plan for this trend as evidenced by DWD's Health Care Workforce Development Committee's activities.

In the 2000-2004 WIA State Plan submitted to DOL on June 28, 2000, a number of weaknesses were identified by the State Council on Workforce Investment. Those included areas that continue to be problematic and certainly have an impact on the credential attainment measures, in general: "Low priority on career awareness and development for K-12 students and parents; Image as a 'low wage' State; Education and education-related training not responsive quickly enough to address labor market fluctuations and employers' on-the-job needs." Wisconsin's waiting lists at the Technical Colleges and University of Wisconsin System for admission to some critical employment shortages programs or courses of study, particularly in the health industry from certified nursing assistants to physical therapists, continue to exacerbate the problem of timely admission and completion of training programs.

ii. The State's proposed remedy to address the cause

The Corrective Action Plan to improve performance results for the Adult Employment and Credential Attainment Measure was initiated, and includes the following elements:

- In-depth data analysis;
- ASSET modifications;
- State-wide training for WIA staff;
- Issuance of State policies; and
- Partner and Job Center infrastructure improvements.

ASSET

ASSET reporting improvements are being developed for implementation in PY 04. Using PY 02 WISARD data and PY 03 ASSET data, SPRA analyzed credential data for the State as a whole and for each WDA along five different dimensions important to attainment of the performance measure. These were various combinations of numbers of exiters who obtained a credential or who did not obtain a credential by the third quarter after exit and the number of exiters who were or were not employed, in post secondary education, or in advanced training in the first quarter after exit. SPRA also examined data for the number of older youth exiters who met the adult credential measure and the number of credentials received in each of several credential categories.

SPRA also provided an analysis of each local WDA's data and identified the area's strengths and areas of concern. SPRA offered suggestions to each area on what the WDA might do to help improve performance. Finally, the report included several "best practice" examples and resources that could be of assistance to the State as a whole and to local areas. DWS has shared the results of the SPRA assessment with all WDBs and has implemented, or is in the process of implementing, the State-level recommendations. The recommendations outlined by SPRA were to:

- Provide local WDBs with a roster for follow-up credential documentation for the current program year;
- Provide Milwaukee WDB with additional technical assistance to support the Older Youth programs; and
- Investigate whether or not the majority of Wisconsin's credentials will meet the new definitions under Common Measures.

Statewide Training for WIA Staff

A number of proposed training activities are currently being developed specifically to address improvements for the credential measure. Those training activities include:

- Two WIA roundtables with information exchanges and training on various technical assistance topics such as credentialing;
- WIA Youth Program Assessment Workshop that offers instruction on how to administer and interpret assessment tools. The training will include a discussion on the impact of assessment upon the WIA youth program performance measures; and
- WIA Assessment Workshop on Literacy and Assessment Services to Title I WIA adults. This training will provide guidance on how the literacy and assessment services can improve WIA performance.

The Earnings and Career Advancement Symposium outlined in the previous measure's plan will address the State's growth industries, the development of strategies to provide related skills upgrade training and skills and occupational certifications. This will clearly increase the learning curve for WIA case managers and supervisors on education and occupational skills credentials.

State Policies

Credential Definition and Reporting: This policy clarifies the adult credential definition and reporting requirements. [Attachment # 19]

Younger Youth Skill Attainment Policy: While not applicable to the performance measure, the development of this policy engaged useful discussion on related issues. [Attachment # 20]

Partner and Job Center infrastructure improvements

Wisconsin continues to study how the effectiveness of Wisconsin's Job Center One-Stop System can be improved, and how WIA resources can be more effectively targeted and linked with other Job Center partner resources. These efforts focused on programs within DWD, with special emphasis on WIA, Wagner-Peyser and Temporary Assistance for Needy Families. Internal workgroups examined integration of programs and quality improvement strategies, funding mechanisms, and organizational issues through the first half of PY 03. An internal workgroup, formed in the second half of

PY 03, gathered information from these previous efforts. Formal recommendations, incorporating specific State policy directives, are expected to be released for discussion with partners and the CWI in PY 05, with DWD/DWS implementation activities expected before the end of PY 05.

iii. The anticipated outcomes for improved performance

- The Job Center infrastructure improvements will effectively increase partner participation that will better enable WIA staff and participants wider access to education and training resources;
- The ASSET revisions will now provide quality participant and program data to local staff and WDBs. The specific "corrections" process, alone, is expected to significantly improve both State and local performances; and
- Continued technical, on-site assistance, and ASSET modifications will incrementally raise the performance results.

Attachments

- # 15 Chart on Corrective Action Plans Activities**
- # 16 Policy on Supplemental Wage Data**
- # 17 Policy on Follow-up Services**
- # 18 Policy on Data Correction Requests**
- # 19 Policy on Credential Definition and Reporting**
- # 20 Policy on Younger Youth Skill Attainment**

Appendices

- A. Governor's Council on Workforce Investment Membership List**
- B. Council on Workforce Investment Vision and Mission**
- C. Council on Workforce Investment Draft Executive Order**

ATTACHMENT # 15
CHART ON CORRECTIVE ACTION PLANS ACTIVITIES

Part I. Statewide Technical Assistance and Training Action Plan (PY 2003)

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
1. ASSET System (WIA data Management System)					
<p>A. ASSET on-line self study - Introduce ASSET reengineered system with on-line self study training (entails correcting system errors as identified). Must complete self study to obtain security clearance. Presently there are 760 users in ASSET production.</p> <p><i>Performance Standards Impact: All WIA performance measures.</i></p>	Statewide, front line service provider (ASSET user) staff, includes subcontract staff, (i.e., WDA staff working on WIA Programs)	On-line self study of system user's guide and case studies	DWD/DWS Staff (IT and Training Office)	<p>A. & B. Total: \$29,547.50 Funding Source: DWD/DWS WIA Administrative funding *</p>	ASSET reengineered system running April 1, 2003 DONE
<p>B. ASSET Labs - Offer three labs for all service provider staff. Labs available in Oshkosh, Madison and Eau Claire.</p> <p><i>Performance Standards Impact: All WIA performance measures.</i></p>	Statewide, front line service provider (ASSET user) staff, includes subcontract staff, (i.e., WDA staff working on WIA Programs)	One-day classroom training	DWD/DWS Staff (IT and Training Office)		ASSET Labs offered: May 1, 12 & 13, 2003 DONE
<p>C. ASSET Data Warehouse Expert Training</p> <p><i>Performance Standards Impact: All WIA performance measures with an emphasis on the measures that state as a whole and/or individual WDAs have difficulty meeting, e.g., placement/retention (younger youth), earnings gains (adults, older youth)m credential rates (older youth, adults, dislocated workers), diploma/equivalent attainment (younger youth).</i></p>	ASSET User Group (WDB ASSET Leads)	On-site computer based/instructor provider training	DWD/DWS and Deloitte & Touche Consulting	<p>Total: \$12,000 Funding Source: WI State Set-aside Funding**</p>	December 2003 DONE

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
<p>D. ASSET Users Data Entry and Performance Standards Review and Question/Answer Sessions.</p> <p><i>Performance Standards Impact: All WIA performance measures with an emphasis on the measures that the state as a whole or individual WDAs have difficulty meeting, e.g., placement/retention (younger youth), earnings gains (adults, older youth), credential rates (older youth, adults, dislocated workers), diploma/equivalent attainment (younger youth).</i></p>	<p>Statewide, local ASSET managers, front line service provider staff, includes subcontract staff, (i.e., WDA staff working on WIA Programs)</p>	<p>Annual, one-day data entry and performance standards review offered to WDBs on individualized basis. Review will include general info on how to use ASSET and the reporting system and specific info on the data warehouse</p>	<p>DWD/DWS staff and ASSET User Group members</p>	<p>Travel costs covered as needed.</p> <p>Funding Source: DWD/DWS WIA Administrative funding *</p>	<p>Annually Fall/Winter 2003</p> <p>DONE</p>
<p>2. Performance Standards Conference Increase awareness of federal and state standards being measured, share “best practices” and tips on how to effectively manage and improve performance and meet standards, and improve staff ability to analyze and interpret performance data.</p> <p><i>Performance Standards Impact: All WIA performance measures with an emphasis on the measures that the state as a whole or individual WDAs have difficulty in meeting, e.g., . placement/retention (younger youth), earnings gains (adults, older youth)m credential rates (older youth, adults, dislocated workers), diploma/equivalent attainment (younger youth)</i></p>	<p>DWD state staff and statewide, WDB staff and WIA service provider (including subcontract) staff WIA Title I program areas</p>	<p>Statewide, two-day conference (Madison, WI)</p>	<p>DOL ETA staff and private vendor (i.e. Social Policy Research)</p>	<p>Total: \$33,879.95</p> <p>Funding Source: DWD/DWS WIA Administrative funding * and WI State Set-aside Funding** \$15,138.66</p> <p>DOL ETA TAT funding - \$18,741.29 ***</p>	<p>March 23, 24 and 25, 2004</p> <p>DONE</p>

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
<p>3. Data Analysis of Wisconsin's Older Youth Attainment of Educational or Occupational Skills</p> <p>Review and analyze Wisconsin's WIA Older Youth credential data for the state and 11 workforce development areas for Program Year (PY) 2002 and PY 2003.</p> <p>Performance Standards Impact: WIA Older Youth Attainment Credential Measure.</p>	<p>State and Workforce Development Areas</p>	<p>Written report containing the results of the analysis, including identifying key issues creating problems and recommendations for performance improvement.</p>	<p>The Social Policy Research Associates (SPRA)</p>	<p>Total: \$1,408.71</p> <p>Funding Source: Region V DOL TAT funding - \$1,408.71</p>	<p>June 2004</p> <p>DONE</p>
<p>4. Youth Services Roundtables</p> <p>A. Refresher on WIA Youth Services programs/approaches leading to improved performance. Will address case management, skills/goals setting, ISS development and offer tips on effective assessment, program exiting, tracking and follow-up.</p> <p>B. Youth Service Roundtable will provide case management training with a focus on older youth in related performance standards including credential attainment.</p> <p>Performance Standards Impact: All WIA Youth Program measures, with emphasis on measures the state whole or individual WDAs have difficulty meeting, e.g., younger youth placement/retention, diploma/equivalent and older youth credentials & earnings.</p>	<p>Statewide, WIA Title I WDB youth staff, front line service provider staff (includes subcontract staff) and youth council members.</p>	<p>A. Four, one-day Youth Services Roundtables held in four locations: Eau Claire, Green Bay, Madison and Milwaukee; and</p> <p>B. One, one-day Older Youth Service Roundtable held in Madison.</p>	<p>A. DWD/DWS expert staff trainers & facilitators</p> <p>B. Contractor and DWD/DWS staff (Youth and WIA expertise required)</p>	<p>Total: \$16,798</p> <p>Training expenditures include, facilities rentals; AV/equipment rentals; and trainer fee, travel and lodging</p> <p>Funding Sources:</p> <p>a. WI State Set-aside Funding - \$10,050 **</p> <p>b. DOL ETA TAT funding - \$6,748</p>	<p>1. October 9, 15, 23, 30, 2003 --</p> <p>DONE</p> <p>2. May 2004</p> <p>DONE</p>

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
<p>5. Enhanced Case Management Skills Training A. WIA Case Management Strategies B. Goal Setting and Employment Planning: Meeting Customer Goals Training will be customized for WIA related workforce, economic and life-long learning development. Training will focus on the fundamentals of effective case management, service strategy plans, assessment, case notes, and follow up.</p> <p>Performance Standards Impact: All WIA performance measures, with emphasis on the measures that state or individual WDAs have difficulty meeting, e.g., placement/retention (younger youth), earnings gains (adults, older youth), credential rates (older youth, adults, dislocated workers), diploma/equivalent (younger youth).</p>	<p>Front line service provider (includes subcontract) staff WIA Title I program areas</p>	<p>Statewide, two-day course case management training series offered at four locations. Each two-day course has a capacity of 25 to 30 participants.</p> <p>Courses offered at DWD/DWS Computer Learning Centers in four locations: Eau Claire, Oshkosh, Madison, and Milwaukee.</p>	<p>Private Vendor (The Kaiser Group)</p>	<p>Total: \$20,927</p> <p>Training expenditures includes training materials, trainer and travel costs, and computer learning center rentals.</p> <p>Funding Sources:</p> <ol style="list-style-type: none"> 1. DWD/DWS WIA Administrative funding - \$3,377* 2. Region V DOL TAT funding - \$17,550*** 	<p>Winter 2004:</p> <ul style="list-style-type: none"> ▪ Oshkosh Workshop – Feb. 11-12 ▪ Madison Workshop – Feb. 25-26 ▪ Milwaukee Workshop – March 3-4 ▪ Eau Claire Workshop – March 10-11 <p>DONE</p>
<p>6. Earnings and Career Advancement (Compressed Video) Symposium D. Identifying WI's growth industries and developing strategies to provide related skills upgrade training. E. Discussing strategies that lead to job advancement and increased earnings, (e.g., mentoring, on-the-job training, skills and occupational certifications)</p> <p>Performance Standards Impacts: WIA Earnings Gains measures for adult, dislocated workers and youth programs.</p>	<p>Statewide, front line service provider (includes subcontract) staff WIA Title I program areas</p>	<p>One-day Symposium via compressed video Symposium offered through compressed video at four state facilities: Eau Claire, Green Bay, Madison and Milwaukee</p>	<p>DWS staff, DOL ETA staff, and other states' staff that have utilized strategies to consistently meet their earnings and advancement standards (Invite representatives from other states with "best practices")</p>	<p>Total: \$2,064</p> <p>Expenditures include: Line Charges; Bridge Charges; Site support fees; and Guest "best practices" presenters travel and lodging</p> <p>Funding Source: WI State Set-aside Funding **</p>	<p>August 26, 2004</p> <p>DONE</p>

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
<p>7. Comprehensive Workforce Development Worker Model (on line WIA staff resource) This project will add WIA basics and program management to enhance the existing new and experience Workforce Development worker models on line resources developed by the DWD/DWS Training Unit.</p> <p>WIA basics will cover program and performance requirements and their relationship to ASSET. Program management techniques will include information on the importance of monitoring service providers and the strategies for ensuring accuracy and integrity of data entry on ASSET. The WIA policy and training guides will be linked to this site.</p> <p>Performance Standards Impact: All WIA performance measures.</p>	<p>DWS staff and statewide WDA staff WIA Title I program areas</p>	<p>On line WIA staff resource information</p>	<p>DWS Training Staff, DWD/DWS State staff and WDAs staff as needed for feedback on web site.</p>	<p>Total: \$6,750 (Estimated 80 hours for site resource development)</p> <p>Fees cover DWD/DWS training staff time on collection, development, review and posting of on line resources.</p> <p>Funding Sources: 1. DWD/DWS WIA Administrative funding - \$750* 2. Region V DOL TAT funding - \$6,000 ***</p>	<p>Summer 2004 (June - July)</p> <p>DONE</p>

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
<p>8. US DOL Business Relations Group (BRG) Initiative for Wisconsin</p> <p>A. DOL created the Business Relations Group (BRG) to develop innovative approaches to helping business and industry better access the services of the state and local workforce investment system. To help fulfill this goal of "achieving the synergy of e³ together," Wisconsin is seeking additional TAT funding for six BRG Symposiums to provide training and information to improve the linkage between the national initiative and the local workforce development system.</p> <p>B. BRG-Employer Relations Team Planning and Toolkit. Employers are a key to the One Stop system and each of Wisconsin's Job Centers has an Employer Relations Team. These teams are in various stages of development and effectiveness. Additionally, Wisconsin is engaged with the DOL Business Resource Group that engages businesses on a national level. It is critical for the BRG and the employer relation's teams to develop local plans to make employers a priority and the resources to make them effective. Funding will be used to develop and purchase existing tools to develop a toolkit for local areas and delivered through a series of BRG events.</p>	<p>Eleven Workforce Development Board Executive Directors and staff, One-Stop Managers and lead staff with special emphasis for all Business Relations staff participation.</p>	<p>Six (6) – Business Relations Group Symposiums</p>	<p>DWD/DWS staff</p>	<p>Total: \$19,852</p> <p>Funding Source: US DOL Region V ETA TAT - \$19,852***</p> <p>(Funding to support out of state travel for National and Region V Staff, and lunch for attendees)</p>	<p>Summer 2004 (June 15 & 17)</p> <p>DONE</p>

**Part II. Draft Statewide Technical Assistance and Training Activities
Proposed to address Earnings Change and Credential Measures**

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
<p>1. Region V U.S. DOL/ETA's Improving Performance on the WIA Title I Earnings gain/recovery Measures training</p> <p><i>Performance Standards Impact:</i> WIA earnings measures for adult, dislocated workers and youth programs.</p>	<p>DWS staff and statewide WDA staff WIA Title I program areas</p> <p>(WDAs will be encouraged to send a team comprised of staff who are responsible for case management, ITA policy, and WDA practices/policies on targeting demand occupations.)</p>	<p>One and one-half days of training In four locations:</p> <p>Eau Claire, Madison Milwaukee and Wausau</p> <p>Each session has a capacity of 40 participants.</p>	<p>Workforce Enterprise Services (Tim Harmon)</p>	<p>Total: \$31,540</p> <p>Funding Source:</p> <p>1. DWD/DWS Administrative funding - \$6,000*</p> <p>2. WI State Set-aside funding - \$6,300**</p> <p>3. Region V DOL ETA TAT funding - \$19,240***</p>	<p>Fall 2004 (November and/or December)</p>
<p>2. WIA Youth Program Assessment Workshop</p> <p>How to administer and interpret assessment tools. Training will include discussion on the following:</p> <ul style="list-style-type: none"> ✓ What is tool used for? ✓ Who should use the tool? ✓ How is the tool administered? ✓ How long does assessment take? ✓ How is assessment scored? ✓ How much does it cost? ✓ How much training is needed for those who administered the tool? ✓ Who uses the product? ✓ What are related/additional items? ✓ Where to obtain samples? <p><i>Performance Standards Impact:</i> All WIA youth programs measures.</p>	<p>Statewide WDA staff WIA Title I Youth Programs</p>	<p>One-day workshop held in two locations: Wausau and Wisconsin Dells</p>	<p>DWS/BWP staff (Roger Gantzarow)</p>	<p>Total: \$6,880</p> <p>Funding Source:</p> <p>1. WI State Set-aside funding - \$2,000**</p> <p>2. Region V DOL ETA TAT funding - \$4,880***</p>	<p>Fall 2004 (November)</p>

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
<p>3. Workforce Investment Act (WIA) Roundtables</p> <p><u>Day One</u> – Orientation meeting with case Management skills, performance measures, use of ASSET, and other technical assistance and training as needed.</p> <p><u>Day Two</u> – Information Exchange on WDA "best practices", WIA policy laws and regulations, and updates on WIA Worker training web site.</p> <p>Breakout workshops held on both days by WIA Programs: adults, dislocated worker and youth</p> <p>TAT topics:</p> <ul style="list-style-type: none"> ✓ Assessment tools ✓ Credentialing ✓ High growth industries/occupations ✓ Income growth strategies ✓ Occupational competencies/skills ✓ WIA collection of supplemental data ✓ WIA Worker Training Web Site <p>Performance Standards Impact: <i>All WIA performance measures with an emphasis on the measures that Wisconsin as a whole and/or individual WDAs have difficulty meeting.</i></p>	<p>Statewide, WDB staff and WIA administrative, planning and service provider (including subcontract) staff for the WIA Title I program areas</p> <p>(See also: WIA Assessment Workshop on Literacy and Assessment Services to Title I WIA Adults. Roundtables are scheduled in conjunction with Assessment Workshop.)</p>	<p>Two, two-day WIA roundtables</p> <p>Roundtables would be held in Madison and Wisconsin Dells</p>	<p>DWD/DWS staff, and US DOL ETA staff and training consultants</p>	<p>Total: \$27,910</p> <p>Funding Source:</p> <ol style="list-style-type: none"> 1. WI State Set-aside funding - \$15,000** 2. Region V DOL ETA TAT funding - \$12,910*** 	<p>Spring 2005 (March)</p> <p>Fall 2005 (September)</p>
<p>4. WIA Assessment Workshop on Literacy and Assessment Services to Title I WIA Adults</p>	<p>Statewide WDB administrative staff, and WIA Title I Adult and</p>	<p>Spring 2005: Two, one-day workshops</p>	<p>Training consultant and DWD/DWS</p>	<p>Total: \$16,050</p> <p>Funding Source:</p>	<p>Spring 2005 One day workshop -</p>

Area/Topic (Activity)	Target Audience	Method of TA	Provider/Source	Hours/Days or Costs and Funding Source	Target Date
<p>Introduce standards and requirements of Title II literacy program for adults (educational level functioning descriptions), and explain recommended educational tests for each functioning level. The training will also provide guidance on how the literacy and assessment services can improve WIA performance.</p> <p>Performance Standards Impact: <i>All WIA Adult Programs measures, with an emphasis on the following measures: 6-months retention in unsubsidized employment and attainment of educational or occupational skills credential.</i></p>	<p>Dislocated Worker case managers</p> <p>Each training workshop and session has a capacity of 35 participants.</p> <p>(See also: WIA Roundtables scheduled in conjunction with WIA Assessment Workshop on Literacy and Assessment Services.)</p>	<p>held in Madison. One workshop held the day before and another workshop held the day after the spring 2005 WIA Roundtable.</p> <p>Fall 2005: Two, half-day follow-up sessions held in Wisconsin Dells. One session held the day before and another held the day after the fall of 2005 WIA Roundtable</p>	<p>staff</p>	<p>1. DWD/DWS Administrative funding - \$6,000*</p> <p>2. WI State Set-Aside funding - \$3,000**</p> <p>3. Region V DOL ETA TAT funding - \$7,050***</p>	<p>March</p> <p>Fall 2005</p> <p>Half-day follow-up session - September</p>
<p>Funding Source Key:</p> <p>* = DWD/DWS WIA Administrative funding ** = WI State Set-aside funding *** = DOL ETA TAT funding **** = DWD DW Program</p>					

ATTACHMENT # 16

Date: July 1, 2004

To Workforce Development Board Executive Directors

From: Connie Colussy, Director
Bureau of Workforce Programs

Subject: **Workforce Investment Act (WIA) Policy Update 04-07 – Supplemental Wage Data**

Purpose

This provides guidance to Workforce Development Boards (WDBs) regarding the use of supplemental income data for Workforce Investment Act (WIA) Title I performance measures.

Legislative/Regulatory References

- Training and Employment Guidance Letter (TEGL) 7- 99
- Training and Employment Guidance Letter 14- 00
- Workforce Investment Act 20 CFR § 666

Background

The U.S. Department of Labor (U.S. DOL) issued initial instructions on March 3, 2000 to implement performance measures for the WIA. This technical guidance, TEGL 7- 99, contains the policy and processes for definition and computation of all 17 performance measures required under the WIA. All measures that require a determination of employment after program exit are required to use the Unemployment Insurance (UI) Wage Record as the resource for determining employment and earnings. The only performance measures that do NOT use UI or other wage data are the Younger Youth Skill Attainment Rate, the Younger Youth Diploma Attainment Rate, and the Customer Satisfaction measures.

The TEGL recognizes that not all employment is covered by UI wage reporting requirements, and it provides instructions for handling participants who are working in uncovered employment as determined through evidence of supplemental wage data. Supplemental wage data has different applications in the calculation of the various measures. If a WIA participant is not found in the UI wage system, supplemental data sources may be used to determine employment status. That individual is included in the calculations for the entered employment, employment retention, and employment and credential attainment measures. For the Adult and Youth average earnings change measure and Dislocated Worker earnings replacement rate, if a WIA participant is not found in the UI wage system and supplemental data sources are used to verify the individual's earnings and employment status, the individual is excluded from each earnings measure's numerator and denominator.

To date, Wisconsin has not utilized supplemental data sources. This is one of several factors contributing to Wisconsin's failed performance on this measure two years in a row.

Policy

In order to most accurately reflect the participants successfully served by WIA and reported for performance measure purposes to U.S. DOL, the Department of Workforce Development,

Division of Workforce Solutions (DWD/DWS) will implement a process for identifying and reporting supplemental wage data.

WDBs must obtain and document supplemental income data for adult, youth, and dislocated worker participants who are not found in the UI Wage Record. Supplemental income information will be used to adjust the WIA Title 1 performance measures when UI wage record data is not available for a participant and another acceptable source of data can document that the individual is employed.

Such circumstances may include individuals who are:

- a. Self-employed (e.g. agriculture, consultant, barber, cosmetologist);
- b. Non-covered employees (e.g. federal employees, such as military, postal service, railroad);
- c. Employed out-of-state (Note: The Wage Record Interstate System[WRIS] may capture this data, however, Michigan and Illinois are not utilizing WRIS. Illinois expects to be operational in May, 2004.)

Data sources and documentation

Acceptable wage record data may be obtained through case management, follow-up services, or participant survey to determine that the individual is employed, provided that written documentation of that employment is verified and maintained. Computer records from automated record matching are considered a valid written record, such as the State Department of Revenue (e.g., for State income tax of self-reported earnings). A survey or telephone response from a participant or employer must be accompanied by a written document, such as a W-2, pay stub(s), or 1099 covering the period(s) called for by the pertinent performance measure(s). For self-employed individuals, written verification from major clients is also acceptable documentation.

Supplemental data must be reported within 30 days after the individual was found missing in the UI wage record. Supporting documentation must be retained as part of the local participant record. At a minimum, WDBs must collect supplemental data for participants who are employed in the first quarter following the exit quarter and the third quarter following the exit quarter, when UI wage record data does not exist. WDBs have the option to gather and report earnings data for participants for all five quarters following the exit quarter to improve DWD/DWS ability to provide meaningful outcome data for local planning purposes.

ASSET Reporting

ASSET will be modified during Program Year (PY) 2004 to facilitate proper reporting of supplemental earnings data. Until this modification has been designed, tested and published, the following procedure will be used so that DWD/DWS can apply this policy, to the extent possible, to PY 2003 performance results.

1. Each performance quarter, WDB staff will receive a listing via e-mail of all participants in the performance measures for whom no UI or WRIS cross-match is found;
2. WDB staff will distribute this listing to case managers, who have 30 calendar days from the date of file transmission to contact participants to determine their employment status;

3. Case managers must obtain and retain on-site the documentation specified above as proof of employment;
4. WDB staff must revise and return the file to Nancy Bryan at DWD/DWS. This file will be used to adjust the performance results until all modifications can be integrated into ASSET;
5. Entry of first and third quarter supplemental earnings data in ASSET prior to system modification is at the WDB's discretion.

Action Required

The ASSET reporting procedures for PY 2003 will be implemented immediately and used until after the implementation of on-line reporting in ASSET, no later than December 31, 2004.

WDBs should review and revise local policies and procedures to ensure that supplemental income data is appropriately collected and documented as detailed in the above policy. In addition, WDBs should ensure that WIA case managers and others responsible for entering ASSET data and monitoring WIA performance are familiar with these policies and procedures.

Questions and Technical Assistance

The attached provides further detail and examples of how the Supplemental Income Data Policy would be applied in various situations.

If you have questions about this policy or its implementation, contact Nancy Bryan (608) 2660249, nancy.bryan@dwd.state.wi.us or your local program liaison.

ATTACHMENT Supplemental Income Data Policy Further Details and Implementation Examples

Specific customer file examples and the U.S. DOL Office confirmation of answers are provided below to illustrate how supplemental earnings data affects the Adult Earnings Gain measure. These same criteria will also apply to the Older Youth Earnings Gain measure and the Dislocated Worker Earnings Replacement Rate measure.

REMINDER: UI wage records will be the only data source for the Adult Earnings Change Measure. Therefore, individuals whose employment in either the first **OR** third quarter after exit was determined from supplementary sources, and not from UI wage records, are excluded from the measure. The role of the "first OR third quarter" filter plays a key factor in determining the exclusions for the denominator.

#1 Jane Doe: Has no earnings in Quarter (Q)1 and no earnings in Q3.

Answer: May not necessarily be excluded from the denominator. Jane may have appeared in the UI wage file and earned \$0.00 in both quarters. This would be a unique scenario, but the presence of Jane in the UI wage file in Q1 and Q3 after the exit quarter would put her in the measure. Otherwise, if Jane was not found employed in the first quarter after the exit quarter (whether through UI or supplemental), she would definitely be excluded from the measure.

#2 Anne Zee: Has UI earnings in Q1 and no earnings in Q3.

Answer: Include in the denominator.

#3 Bob Wye: Has supplemental earnings in Q1, no earnings in Q3.

Answer: Exclude from the numerator and denominator.

#4 Mary Gee: Has UI earnings in Q1 and Q3; no supplemental earnings.

Answer: Include in the numerator and the denominator.

#5 Paul Eff: Has supplemental earnings in Q1 and Q3; no UI earnings.

Answer: Exclude from the numerator and the denominator.

#6 Pam Kay: Has UI earnings in Q1, Q2 and Q3; has supplemental earnings in Q1, Q2 and Q3.

Answer: Include in the denominator. Only the UI earnings are used in the post-program part of the numerator.

#7 Mark Cee: Has UI earnings in Q1, UI earnings in Q2 and supplemental earnings in Q3.

Answer: Individual is excluded from the measure because employment in Q3 was determined through supplemental sources AND Mark was not found employed using the UI wage file.

#8 Phil Enn: Has UI earnings in Q1, supplemental earnings in Q2, and UI earnings in Q3.

Answer: Individual is included in the denominator. Only the Q3 earnings can be used, and the Q2 earnings are effectively \$0.00. It is better for Wisconsin to get the Q3 earnings in the measure, because the individual is in the denominator.

#9 Ali Eye: Has UI earnings in Q1, Q2 and Q3; has supplemental earnings in Q1; no supplemental earnings in Q2 or Q3.

Answer: Individual is included in the denominator. Only the UI earnings are used for the post-program part of the numerator.

#10 Bill Eff: Has UI earnings in Q1, Q2 and Q3; has no supplemental earnings in Q1, has supplemental earnings in Q2, and no supplemental earnings in Q3.

Answer: Individual is included in the denominator. Only the UI earnings are used for the post-program part of the numerator.

#11 Judy Ell: Has supplemental earnings in Q1, UI earnings in Q2 and UI earnings in Q3.

Answer: Individual is excluded from the measure because Judy's employment in Q1 was determined through supplemental sources AND Judy was not found employed using the UI wage file in that same quarter.

#12 John Bee: Has supplemental earnings in Q1, supplemental earnings in Q2, and UI earnings in Q3.

Answer: Individual is excluded from the measure because John's employment in Q1 was determined through supplemental sources AND John was not found employed using the UI wage file in that same quarter.

#13 Tom Ewe: Has supplemental earnings in Q1, UI earnings in Q2, and supplemental earnings in Q3.

Answer: Technically, the individual is excluded from the measure because Tom's employment in Q1 was determined through supplemental sources AND Tom was not found employed using the UI wage file in that same quarter.

ATTACHMENT # 17

Date: September 22, 2004

To: Workforce Development Board Executive Directors
One-stop Operators and Job Centers
Youth Program Managers/Lead Contacts

From: Connie Colussy
Director
Bureau of Workforce Programs

Subject: **Workforce Investment Act (WIA) policy Update 04-02 – WIA Follow up Services**
(Revised "Policy" section of 04-02 - WIA Follow up Services policy for clarification)

Purpose

This policy update is to provide clarification on allowable follow-up services for registered customers of the adult, dislocated worker, and youth Workforce Investment Act (WIA) programs. Revisions were made to the purpose, background and policy sections of the initial policy in response to feedback received from field staff at technical assistance and training events.

The initial follow-up service policy was developed in response to the Department of Workforce Development (DWD)/Division of Workforce Solutions (DWS) observations during monitoring of WIA performance standards. In addition, Workforce Development Boards (WDBs) have requested guidance regarding the following:

- If WIA funds can be used on follow-up services once a participant is exited;
- What kinds of activities are allowed;
- How these services are to be recorded in the Automated System Support for Employment and Training (ASSET); and
- How such expenditures should be recorded on the WIA Monthly Financial Status Report.

Policy/Legislation References

- Workforce Investment Act Title IB, Section 129(c)(2)(I); Section 134 (d)(2)(k), Section 134(e)(3)(A).
- 20 CFR part 663; 663.150(b); 663.155; 664.450(a)(b).
- DWS Workforce Program Guide, Part 2. Section II.(o); Section III. (I)(9).

Background

The WIA establishes follow-up services as an allowable activity. The goal of follow-up services for adult, dislocated worker and older youth (19 to 21 years old) customers is to ensure job retention, wage gains, and career progress for individuals who obtain unsubsidized

employment. The goal of the follow-up services for younger youth (14 to 18 years old) participants is to enable participants to continue life-long learning and achieve a level of self-sufficiency.

In order to attain desired follow-up services, service providers need to go beyond phone calls and other periodic contacts. It may be beneficial to follow-up with both customers and their employers. Additional suggestions for improving delivery of follow-up services include:

- At intake, as Employment Specialists mutually establish services with a customer, intentionally design follow-up and retention services.
- Consider contracting with Business Consultants or Orientation Specialists to only provide follow-up and job retention services to focus efforts and maximize relationships with employers.
- Avoid telling customers their status such as "exiting." This is an ASSET term and Employment Specialists need to be clear about ending a service versus exiting a customer per ASSET.
- At ASSET exit, record or set up a tickler file on when to check up on a customer, and assist with any employment retention needs.

Policy

The emphasis of follow-up services is job retention and advancement, lifelong learning and self-sufficiency, and provision of additional services as needed to assist program customers. While intensity, frequency, and type of follow-up services are determined at the local level, the Department of Workforce Development recommends that program providers conduct follow-up frequently enough to address on-the-job issues and prevent job loss. Follow-up is critical to ensure successful, long-term employment and directly relate to WIA performance outcomes.

The follow-up provided should be based upon individual customer needs as well as the goals and objectives of the local WDB system

Adults and Dislocated Workers:

Follow-up services **must be made available** as appropriate for adults and dislocated workers, who are customers and placed in unsubsidized employment, following the first day of their employment. Review the customers' needs as well as their individual employment plans (IEP) to determine if it is appropriate to provide them with follow-up services. While follow-up services must be made available, not all of the adults and dislocated workers who registered and were placed into unsubsidized employment will need or want such services. Participants who have multiple employment barriers and limited work histories may be in need of significant follow-up services to ensure long-term success in the labor market.

It is expected that training and supportive services provided after entry into unsubsidized employment (post-placement/entered employment) will be limited, and clearly documented in the customer case file and ASSET database. Such post-placement/entered employment training and supportive services may be provided consistent with policies established by the local workforce development board and determined to be necessary on an individual basis by the board.

Older and Younger Youth:

Older youth and younger youth participants **must receive** some form of follow-up services for a minimum of 12 months after they are ASSET exited.

Funding of Follow-up Services

1. WIA funding for adults and dislocated workers follow-up services is an allowable expenditure; and
2. Financial assistance as needs-related payments for employed participants is not an allowable follow-up service, when a customer is in post-placement (entered employment). These payments are restricted to unemployed individuals who have exhausted or do not qualify for unemployment compensation and who need the payments to participate in training.

Appropriate and Allowable Activities

The following guidance is provided to assist program providers in determining what follow-up services would be appropriate and allowable expenditures. Follow-up services may be provided beyond 12 months at the discretion of the local WDB. While follow-up services must be made available, not all participants will need or want such services. The scope and intensity of appropriate follow-up services may vary among different participants and should be consistent with the individual service strategy for each participant.

All other WIA activities that were allowable prior to ASSET exit are allowable after exit. When individuals are ASSET exited (whether soft exit due to non activity, or hard exit due to customer becoming employed or customer leaving and not being employed) from the ASSET database it does not mean they are exited from the WIA program.

It is allowable for WDB staff to do follow-up such as contacting an employer for a customer, especially in cases where their current contracts with providers has a duration less than 12 months after customers are ASSET exit. However, to ensure compliance with federal direct services regulations, WDBs need to use contractors when providing customers with certain follow-up services such as those provided for a formal training course.

Sample activities are listed below for the adult and dislocated worker programs and the youth programs.

Adult and Dislocated Worker Programs Follow-up Services:

- Additional career planning and counseling (for example, labor market information, demand occupations, job search assistance, entrepreneurial training, career counseling, resume development, etc.);
- Employer contact, including assistance with work-related problems (for example, on-site visits, information on Work Opportunity Tax Credit, bonding, workplace training instruction, post-employment (entered employment) training on interim services or a limited basis, incumbent worker services, English as a Second Language, etc.);
- Information about additional educational opportunities (for example, referral to WI Technical College System or other institutions, General Educational Development Test, WIA funded and other educational opportunities, etc.);

- Peer Support Groups (for example, group counseling, workshops, etc.); and
- Supportive Services information (for example, childcare, housing, transportation, vocational rehabilitation assistance, work clothing, etc.).

Youth Programs Follow-up Services - Allowable follow-up services are among any one of the ten required youth program elements, which include:

- Adult Mentoring (for example, job shadowing, tutoring, etc);
- Assistance in securing better paying jobs, career development, and further education (for example, labor market information, career counseling, job search assistance, work experience programs, etc.);
- Employer contact (for example, assistance in addressing work-related problems);
- Job Club or another type of continuing post placement activity to keep youth engaged and help identify retention problems;
- Leadership development opportunities that encourage responsibility, employability, and other positive social behaviors. (For example, exposure to post secondary educational opportunities; community and service learning projects; peer-centered activities, including peer mentoring and tutoring; organizational and team work training, including team leadership training; training in decision-making, including determining priorities; and citizenship training including life skills training such as parenting, work behavior training and budgeting of resources.);
- Supportive Services activities (for example, linkages to community services; referrals to medical services; and assistance with childcare and dependent care, housing, transportation and/or uniforms or other appropriate work attire and work-related tools, including eye glasses and protective eye gear.)
- Tracking progress in employment after training (for example, regularly-scheduled follow up, including in-person sessions); and
- Work-related Peer Support Group (for example, workshops, English as a Second Language, literacy, etc.).

Reporting Follow Up Services in ASSET

Follow-up services are to be recorded in ASSET system under the “Manage Follow-ups” function. Program customers must be exited in ASSET prior to follow-up services being recorded.

To report follow-up services in ASSET:

1. Select “Manage Follow-Ups”;
2. Go to “Follow-up Services”;
3. Click, “Add Follow-up Service” button;
4. Enter the appropriate information and save the record.

For further instruction on how to enter and update follow-up services, see the *ASSET User’s Guide* at <http://www.dwd.state.wi.us/dws/manuals/asset/>. The *User’s Guide* is available on-line, simply by selecting “Help” from the ASSET menu selection list.

Under the policy, the key date for initiating Follow-Up Services is the exit date. To assist local agencies in determining which individuals have been exited, a report was created in the Job Center Systems Data Warehouse that gives a worker an opportunity to select a group of individuals by exit date. This report - JCSDW Report #38 - WIA Title 1 Exits (date range prompt) - allows a worker to find all exiters for a specific period. For example, if the WDB

requires a final follow-up for everyone who exited in November 2002, then simply enter date parameters of 11/01/2002 through 11/30/2002 to get everyone who needs to have a follow-up done before the end of November 2003.

WIA Monthly Financial Status Reporting

Follow-up service costs are to be considered current period program expenditures and should be reported on a WDA's WIA Monthly Financial Status Report.

Action Required

The WDBs and their WIA adult, dislocated worker and youth program service providers are to apply this policy when a customer has been exited from ASSET. Prior to exiting customers from WIA programs, program service providers should ensure that customers have received all employment attainment and retention, and continued learning services that are appropriate for their individual needs.

Questions and Technical Assistance

Should you have questions regarding this policy, please contact the Local Program Liaison (LPL) assigned to your area.

ATTACHMENT # 18

Date: January 20, 2005

To: Workforce Development Board Directors

From: Connie Colussy, Director
Bureau of Workforce Programs

Subject: **WIA Policy Update 04-12 ASSET CORRECTION REQUESTS**

Purpose

This provides guidance to Workforce Development Boards (WDBs) regarding the policies for requesting data corrections in the Automated System Support for Employment and Training (ASSET) participant reporting system.

The policy has been updated to establish deadlines for ASSET data clean-up and corrections as necessary to comply with U.S. Department of Labor (U.S. DOL) data validation requirements. Policy additions are shown as underlined text; the remainder of the policy is already in effect.

Legislative/Regulatory References

- **Workforce Investment Act (WIA) of 1998, Section 185.** Reports; Recordkeeping; Investigations.
- **US DOL TEGL 7-99:** Core and Customer Satisfaction Performance Measures for the Workforce Investment System

Background

The WIA states that “Recipients of funds under this title shall keep records that are sufficient to permit the preparation of reports required by this title... such recipients shall maintain standardized records for all individual participants...” The Act requires that “Each State shall prescribe and maintain comparable management information systems, in accordance with guidelines that shall be prescribed by the Secretary, designed to facilitate the uniform compilation, cross tabulation and analysis of programmatic, participant and financial data on statewide, local area, and other appropriate bases, necessary for reporting, monitoring and evaluating purposes...”

ASSET is the system used for the WIA’s above-stated purposes. Case managers, WDB program management staff and designated State staff are given access to ASSET for the purpose of reporting and monitoring participant activities and outcomes. The level of access to edit, change and remove records is set in accordance with Division of Workforce Solutions (DWS) security systems policy and documented need. Either the participant (through JobNet) or case managers enter initial participant data into the system. Case managers are encouraged to review and monitor their data entry prior to saving the records to minimize the need for changes and edits resulting from inaccurate data entry.

ASSET has edits in place to prevent changing critical data elements that are needed for performance measurement and participant reporting. DWS recognizes that accuracy is not always possible and that mistakes will be made, regardless of safeguards built into the system. The purpose of this policy is to define the processes for changing, updating and removing data from a participant’s record. In July 2004, DWS implemented an on-line data correction requests

process in ASSET. The process was enhanced to improve the review and feedback capacity in November 2004.

In Program Year 03 (PY03), U.S. DOL began requiring states to conduct data validation activities on participant data and WIA annual report results. Data validation begins on October 1 of each calendar year, following submission of the State's Annual Report to the U.S. DOL. Data validation looks at participant and performance information for three years' worth of participant data. Wisconsin is required to validate data reported in a sample of participants who either received services or exited any time between July 1, 2001 and June 30, 2004. In subsequent program years, these dates will shift by one year. For example, in PY04, the validation sample will be selected from a file of participants who received services or exited any time between July 1, 2002 and June 30, 2005. To prevent data validation errors, the participant files must reflect the same data that was reported to U.S. DOL in the annual reports. The purpose of this policy change is to establish the timelines for future data correction deadlines.

Policy

There are four access levels for the data correction process:

1. Case Manager:

- Enters participant data in ASSET.
- Monitors data in coordination with other case managers or programs providing services to the participant to ensure completeness and accuracy.
- Submits Data Correction Requests to WDB-designated Approver or DWS Administrator.

2. WDB Approver:

- Monitors participant data for completeness and accuracy (quality assurance).
- Reviews data correction requests for completeness and compliance with local, DWS or Federal WIA program policies and regulations
- Is accountable for data correction requests that are inappropriate or violate local, DWS or Federal WIA program policies and regulations.
- Approves appropriate requests for action by ASSET Administrators.

3. DWS Administrator:

- Reviews approved data correction requests for completeness and accuracy.
- Makes changes if determined appropriate.
- Denies changes if determined inappropriate.
- Requests guidance from DWS Quality Assurance (QA) Reviewers when policy is unclear as to the appropriateness of the correction request or when the correction affects performance measures or program requirements.
- Monitors change requests for trends and common issues that may require policy development, technical assistance, or system changes.

4. DWS QA Reviewer:

- Monitors change requests for trends and common issues that may require policy development, technical assistance or system changes.
- Reviews, and approves or denies, correction requests if the correction affects performance measures or program requirements.

The following are general guidelines regarding the types of data changes that may be requested and procedures for making those changes.

1. Changes to Active Participant Records

Case managers can make some changes to participant records without submitting a data correction request and should do so whenever possible.

Information in ASSET that is entered on the Manage Programs screens and used to determine program eligibility must reflect the applicant's status at the time of eligibility determination and cannot be changed after enrollment, except for name and address changes.

For example: If an applicant receiving Wisconsin Works (W-2) was erroneously reported as not receiving W-2, the entry may be corrected. On the other hand, if ASSET correctly shows that a participant was not receiving W-2 at the time of WIA Title 1 program enrollment, that information must remain on the record even if the participant begins receiving W-2 after enrollment.

Case managers may request changes to other data elements entered in error. As case manager and WDB proficiency with ASSET increases, the rate and types of errors that occur should decrease. Changes of this type will be reviewed and monitored, and addressed through ASSET system fixes, User Manual updates, program policy updates or training, as determined appropriate to correct common reporting errors.

In March 2004, the Event History was added to ASSET to allow system users to review changes that were made to each screen in the system. It is not a comprehensive listing; it shows only changes that are important to track for performance measurement, Federal reporting, or other program compliance purposes. The event history shows what was changed, who changed it, and when the change occurred.

2. Changes to Historical Records and Non-Editable Fields in Active Records.

Any change to an historical record or non-editable field must be made by a DWS ASSET Administrator. Each change must be clearly described and approved by the WDB-designated Approver. The WDB Approver is responsible for ensuring that changes are reasonable and appropriate. Data change requests will be monitored for trends or patterns and action taken as needed to ensure the process is functioning as intended.

Case managers and WDB staff may NOT request that participant data, including actual begin and end dates for services, be removed or enhanced solely to avoid a negative outcome in WIA Title 1 performance measures. Any data correction request that affects the performance measures will be reviewed and monitored. Trends will be noted and addressed through monitoring and technical assistance by DWS staff.

3. Deletions

Federal policy regarding participant exits is clear: "Once a participant has not received any WIA funded or partner services for 90 days, except for follow-up services and there is no planned gap in service or the planned gap in service is for reasons other than those specified above, that participant has exited WIA for the purpose of measurement in 15 of the 17 core measures (the YY skill attainment rate and employer customer satisfaction measures are not based on exit)." (*TEGL 7-99.D. Point of Exit for Counting Outcomes*).

DWS staff will not delete service records without justification. If a service was planned, but never actually occurred, then the case manager may request that the actual service begin and/or end dates be removed from the form. If the record is still active, the case manager can do this locally without submitting a change request. A case manager can enter the reason for the change in the Comments field on the service screen that is changed.

DWS staff will not delete soft exits without compelling documentation in ASSET that the soft exit was applied in error. Maintaining a paper file instead of reporting participant and service information in ASSET is not sufficient justification to support the removal of a soft exit. Case managers and WDB staff are expected to monitor the Soft Exit Warning list in ASSET on a regular basis to prevent soft exits from occurring if a participant is still receiving services other than core self- or informational services. At a minimum, the Soft Exit Warning list should be reviewed weekly.

Sometimes, a person may have two records in ASSET under multiple Social Security Numbers (SSN) and there are services reported under each SSN. When DWS staff determine which record is the correct one, the records will be merged by creating new services under the good SSN and deleting the entire bad SSN record, including services.

Any other circumstances that a case manager or other responsible party believes support the removal of a soft exit or the deletion of data in ASSET will be reviewed on a case-by-case basis. Deletions will be the exception, rather than the rule.

4. Final Cut-off Dates For Requesting Changes

Effective with the publication of the final updated policy, case managers and WDBs will not be permitted to make changes to any participant record if the participant exited before October 1, 2003. Beginning with Program Year 2004 (PY04), the final cut-off date for data correction requests will be on September 10th of each program year. After that date, the ASSET data for the program year just ended will be "frozen" and no further corrections to the data will be accepted.

The U.S. DOL has synchronized the quarterly and annual report cycles. The fourth quarter report, which is available in mid-August of each program year, will reflect the participants who will also be reported in the annual report. This gives WDBs four weeks to review the data, request corrections and update participant records to ensure annual report results are as accurate as possible.

ASSET Reporting

Complete instructions for requesting data corrections were provided in the Job Center Systems Infoline that was published on September 24, 2004.

1. Case managers and WDB staff will have access via ASSET to the Data Change Request screen. If the data to be changed affects WIA Title 1 participants, they select the appropriate WDB-designated approver, and ASSET will "send" the request to that individual for review. In most instances, this will be an ASSET User Group representative.

2. The WDB-designated approver either rejects or approves the change making the necessary changes to the request and saving the screen. The request is then “sent” to DWS for review and action.
3. DWS Administrators review the requested change and determine whether or not the change is appropriate and consistent with State and Federal policy. If the Administrators are unable to determine if the change is appropriate, the request will be forwarded to the WDB’s local program liaison and DWS policy staff for review.
4. When changes are approved, the DWS Administrators will make the requested changes and mark the request’s status as “Completed.” If a change is disapproved, the request’s status will be changed to “Denied” and the reason for the rejection will be entered into the “Description” field on the change request screen.

WDB staff and case managers will be able to review the status of their changes and the reasons for change request rejections.

Action Required

This policy is effective immediately upon publication.

ATTACHMENT # 19

Date: November 5, 2004

To: Workforce Development Board (WDB) Executive Directors, Automated System Support for Employment and Training (ASSET) User Group Representatives

From: Connie Colussy, Director
Bureau of Workforce Programs

Subject: **04-13 Policy Update - CREDENTIAL DEFINITION AND REPORTING**

Legislative/Regulatory References

- **Workforce Investment Act (WIA) of 1998, Section 136.** Performance Accountability System
- **WIA Final Rules, 20 CFR Part 652, et. al. S.666.100.** State Measures of Performance
- **U.S. DOL TEGL 7-99.** Core and Customer Satisfaction Performance Measures for the Workforce Investment System
- **ASSET Reporting Policy 02-01.** Credential Definition and Reporting
- **WIA Policy Update 02-07.** Subsequent Eligibility Policy on Intensive Services and Training

Note: This policy is being restructured and renumbered to bring it into alignment with other WIA policy updates now prepared and distributed by the Bureau of Workforce Programs.

Background

In Program Year 2001 (PY01), Workforce Development Board (WDB) performance on the credential attainment measure fell short of the negotiated levels for PY01. The Job Center Systems Business Area (JCSBA), which was responsible for setting Automated System Support for Employment and Training (ASSET) usage and reporting policies at that time, developed and distributed *ASSET Reporting Policy 02-01, Credential Definition and Reporting*.

The policy achieved the intended result in improving State-level performance for awhile. However, in PY03, its all-inclusive application to training activities that are defined as "Intensive Services" under the Workforce Investment Act (WIA) has had the unintended consequence of causing some WDBs and the state to fail the measure because local policy may be more restrictive than the state policy.

ASSET contains a feature that, with some modification, will allow local discretion for training activities that are reported as Intensive Services, and when those activities should or should not be incorporated into the WIA Title 1 *Adult and Dislocated Worker Employment and Credential Attainment* measures. This proposed policy revision addresses the modification that will be made to ASSET and contains instructions for proper reporting, once the change has been implemented.

The policies surrounding what is a credential-eligible activity are not being changed at this time. This policy affects only the reporting of credentials for performance measurement purposes. The Division of Workforce Solutions policy staff will address issues regarding what constitutes a credential-eligible training or what types of training activities result in credentials when planning and implementation of common performance measures begins.

This policy does not affect Older Youth, because all older youth who exit WIA are placed in the *Older Youth Credential Attainment* measure. Younger Youth are expected to earn a high school diploma or equivalent; thus this policy does not affect the *Younger Youth Diploma or Equivalent Attainment* measure.

Policy

Any completed training that:

1. results in the issuance of a certificate or document verifying successful completion of the training, and
2. leads to employment,

can be counted as a credential attainment and reported as such in ASSET.

"Training" is defined as: One or more courses, or classes, or a structured regime, that upon successful completion, leads to:

- a. A certificate, associate degree, or baccalaureate degree; or
- b. The skill or competencies needed for a specific job or jobs, an occupation, occupational groups, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to commencement of training.

The following activities, subject to the criteria listed above, are credential-eligible:

- occupational skills training, including training for nontraditional employment;
- on-the-job training;
- programs that combine workplace training with related instruction which may include cooperative education programs;
- training programs operated by the private sector;
- skill upgrading and retraining;
- entrepreneurial training;
- short term prevocational activities to prepare individuals for employment or training;
- adult education and literacy activities in combination with other training; and,
- customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

Staff should apply the above criteria when reporting credential attainment and record this information on the Manage Follow Up, Follow Up Credential Screen under the appropriate credential category.

ASSET Reporting

In ASSET, the question, "*Is this activity leading to a Credential?*" will be removed from the WIA Title 1 Youth Service screen and the WIA Title 1 Adult and Dislocated Worker Training Services screens. The question will appear on the Adult and Dislocated Worker Intensive Services screen only if the service reported is: Basic Skills or Literacy Activities, GED Training Stand Alone, Internship, Pre-Vocational Services or Work Experience.

1. Click Manage Services, and select "Add Service."
2. Select Intensive Service Category.

3. Select Basic Skills or Literacy Activities, GED Training Stand Alone, Internship, Pre-Vocational Services or Work Experience.
4. Subject to WDB policy and/or the participant's Individual Employment Plan, select "Yes" or "No" in response to the question: *"Is this activity leading to a Credential?"*
5. The question must be answered at the time the service is created. Once the case manager has responded to the credential question, the field cannot be changed.
6. Click Save.

Action Required

This policy will be implemented on November 1, 2004, and is retroactive to October 1, 2003. The ability to report this information in ASSET will not be available until November 15, 2004. Case managers and WDB staff will be permitted to request changes to existing participant records via the Data Correction change request process in ASSET for any participant who is either active or exited between October 1, 2003 and November 15, 2004. After November 15, case managers will be able to use this reporting option for new services and are expected to follow the ASSET reporting instructions described above. Changes will not be made to any participant's record if the exit occurred prior to October 1, 2003.

If you have questions about this policy, please contact Nancy Bryan at (608) 266-0249 or e-mail her at: nancy.bryan@dwd.state.wi.us.

ATTACHMENT # 20

Date: May 24, 2004

To: Workforce Development Board Executive Directors, Workforce Investment Act (WIA) youth program managers and leads

From: Connie Colussy, Director
Bureau of Workforce Programs

Subject: **Workforce Investment Act (WIA) Policy Update 04 - 06 Younger Youth Skill Attainment**

Purpose

This WIA youth policy update provides guidance to local Workforce Development Boards (WDBs), WIA youth program managers, leads and case managers on the following:

- Objective assessment,
- Development of appropriate, well-written, younger youth skill attainment goals,
- Documentation to verify accomplishment of younger youth skill attainment goals, and
- Recording younger youth skill attainment goals in Automated System Support for Employment and Training (ASSET).

Policy and legislative references

- WIA legislation, section 129(c)(1)(B), WIA regulations, 20 CFR 664.405(a)(2), 20 CFR 666.100(a)(3)(i)(A) and Department of Labor (DOL) training employment guidance letters (TEGLs) number, 3-99, pages 4, 5, 15, 20, 21, 22, 23, 7-99, pages 21-23, 9-00, pages 4-5, 18-00 page 9, 28-01, pages 4-5
- Department of Workforce Development/Division of Workforce Solutions (DWD/DWS) WIA program guide, part 2, page 24, 109, 110, 111, 115, 117, 118

Background

WIA legislation, Section 129(c)(1)(B) requires local WIA youth programs to include an Individual Service Strategy (ISS) for each youth participant. The ISS must include an employment goal (including nontraditional employment where suitable), appropriate achievement objective and appropriate services based on an objective assessment of academic levels, skill levels and service needs. Skill attainment goals are required for in-school and out-of-school youth; skill attainment goals include basic, occupational or work readiness skill goals. The ISS is developed by the young people and their case managers and should reflect the wants and needs of the young people. It should be updated on a regular basis as young people achieve the goals they have set for themselves.

During the period from January 27 through March 7, 2003, the United States (U.S.) Department of Labor (DOL), Region V staff, conducted reviews of Wisconsin's WIA Title I-B program operations for youth. The scope of the review included performance outcomes, expenditures, governance, memoranda of understandings (MOUs), one-stop implementation, policies and procedures, eligible services, oversight and management information and reporting systems.

The U.S. DOL report resulting from the review contained four observations pertaining to younger youth skill attainment. The observations were:

- Younger youth skill attainment goals, which include basic, occupational and work readiness goals entered in ASSET, did not conform to formal WIA definitions;
- WIA program activities for younger youth did not match goals listed in the ISS;
- Many younger youth skill attainment goals entered in ASSET were not based on an objective assessment and not written in an acceptable manner; and
- There was no documentation found in the case files that verified the youth accomplished the skill attainment goals that were listed in the ISS.

The younger youth skill attainment policy was distributed in draft form for a 30-day review and comment period in March 2004. The final policy contained in this document includes revisions in response to the comments received.

Policy Guidance

- WDBs must provide an objective assessment of the academic levels, skill levels and service needs of each participant. A new objective assessment is not required if the youth activity service provider determines it is appropriate to use a current assessment completed for another education and training program.
- Assessment strategies should include both formal and informal assessment tools. Formal assessments should include some type of standardized procedure, such as a written test or a performance-based assessment with a standardized scoring method. The formal assessments used shall include a review of basic skills, occupational skills, prior work experience, employability, interests, aptitudes (including interests and aptitudes for nontraditional jobs), supportive service needs and developmental needs. Informal assessment tools are subjective and address different characteristics than the formal assessment tools. Informal assessments are less threatening and are generally more enjoyable activities for young people; however, they require more time to administer, and demand thoughtful interpretations. **(See Attachment B for definitions.)**
- Age-appropriate skill attainment goals must be based on the objective assessment and include basic, occupational and work readiness goals. A maximum of three skill attainment goals per year may be set for younger youth performance measure purposes; however, additional goals may also be set. Younger youth that are in school must have, at a minimum, one skill attainment goal set per year. Younger youth that are in school or out of school and have been determined to be basic skills deficient must have a basic skill goal identified in their ISS. The goals must be attained/accomplished no later than one year from the date they were set. **(See Attachment A on assessment and effective goal-setting.)**
- WDBs need to provide documentation to determine whether a youth has met the skill attainment goals set in the ISS. Documentation must include pre-assessment and post-assessment results.
- WDBs must record attained and unattained skill attainment goals on the youth skill attainment screen in ASSET. The attained goals are recorded in the quarter they are achieved. The unattained goals are recorded one-year from the time the goal was set. (Unattained goals will not appear in the denominator until after the goal's one-year anniversary date.) The following directions list the steps for recording skill attainment goals in ASSET.

Short-term goals for performance measurement:

These steps should be followed if the goal is to count in the younger skill attainment rate:

1. Select the goal type,
2. Define the goal,
3. Check the "performance related goal" box,
4. Enter contract ID,
5. Select of modify goal attainment status,
6. Enter goal set date,
7. Enter planned date of attainment (no more than one-year from date set),
8. Enter date the goal is attained (and change the goal attainment status to ensure proper performance reporting), and
9. Enter in comments, which may describe why a specific goal is or is not to be considered for the younger skill attainment rate.

Long-term goal for Individual Service Strategy:

These steps should be followed for recording long-term goals:

1. Select the goal type,
2. Define the goal,
3. Enter contract ID,
4. Select of modify goal attainment status,
5. Enter goal set date,
6. Enter planned date of attainment,
7. Enter date when the goal is attained (and change the goal attainment status for data warehouse report accuracy), and
8. Enter in comments, which may indicate why this long-term goal is being set.

Action Required:

- WDBs should review with WIA youth staff, case managers and youth service providers the objective assessment process and the various types, both formal and informal, of assessment tools that can be used to assess youth objectively.
- WDBs should review, with WIA staff, case managers and service providers, definitions pertaining to younger youth skill attainment that are contained in WIA legislation rules, regulations and U.S. DOL Training and Employment Guidance Letters (TEGLs).
- WDBs should provide technical assistance and training (TAT) to WIA youth staff, case managers and youth service providers on developing and writing clear, well defined, measurable and attainable younger youth skill attainment goals. In addition, WDBs should provide TAT on how to record short- and long-term skill attainment goals on the ASSET younger youth skill attainment screen.
- WDBs should develop policies and procedures, including monitoring procedures, to ensure appropriate documentation is provided in case files that verify the skill goals listed in the ISS have been attained and to assess the extent to which WIA requirements are being met.

Additional References:

DWD/DWS WIA Title I-B Performance Measure Map: A Guide to Performance Reporting and the ASSET System

http://www.dwd.state.wi.us/dws/staff/technical_assistance/technical_assistance_guides.htm

DWD/DWS WIA Title I-B Youth Program Indicators of Performance Technical Assistance Guide

http://www.dwd.state.wi.us/dws/staff/technical_assistance/technical_assistance_guides.htm

DOL “Paper and Process: How Youth Programs Manager Program Intake, ISS Development and Case Files”

http://www.doleta.gov/youth_services/Tech_assistance.cfm

ASSET Users Guide, 3 –5, pages 1 – 11

http://www.dwd.state.wi.us/dws/manuals/asset/pdf/ch_3_5cmmanageeps.pdf

Questions and Technical Assistance

If you have questions please feel free to contact the local program liaison (LPL) assigned to your area.

Attachment A Information on goal-setting and examples of appropriate, well-written, younger youth, basic, occupational and work readiness skill Youth, basic, occupational and work readiness skill goals

Attachment B WIA definitions

Attachment C Summary of key, youth related, federal WIA legislation, rules, regulations and TEGLs

Note: *This policy update can be viewed at*

http://www.dwd.state.wi.us/dwdwia/wia/wia_laws_regulations.htm

Attachment A
GOAL-SETTING STARTS AT ASSESSMENT

Assessment is the foundation of good planning for youth services. Workforce Investment Act (WIA) legislation, Section 129(c)(1)(A), requires Workforce Development Boards to provide an objective assessment of the academic levels, skill levels and service needs. Assessment shall include a review of basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs and developmental needs of each participant.

The objective assessment of basic, occupational and work readiness skills should include the following:

- Ability to read and do math at the ninth-grade level or higher;
- Ability to communicate effectively, both orally and in written materials;
- Ability to solve complex problems where hypotheses must be formed and tested, make decisions and think creatively;
- Reliability, a positive attitude, a willingness to work hard and self confidence;
- Effective management of time, money, materials space and other resources;
- Ability to work on teams, teach others, serve customers, lead, negotiate and work well with people from culturally diverse backgrounds;
- Ability to perform basic computer tasks, such as word processing, manipulating data, using a spreadsheet or data base program and accessing information from the Internet;
- Ability to understand social, organizational and technical systems and design or improve systems; ability to monitor and correct performance; and
- Ability to select equipment and tools, apply technology to specific tasks and maintain and troubleshoot equipment.

Effective Goal-Setting

- Starts with a thorough review of the information obtained during objective assessment;
- Participant must be actively involved in the goal-setting process from the very start;
- Participant feels ownership for their goals;
- Mutual agreement is vital; and
- Goals are achievable, clear and well defined, measurable, realistic, quantifiable, and success-oriented.

Goals identified through the objective assessment process may be categorized in a number of ways. Each type of goal identified is equally important to the development, effectiveness and the overall performance of the program for the participant. Goals should lay the groundwork for completing secondary school, preparing the participant for post-secondary educational opportunities and unsubsidized employment, and becoming a responsible caring adult.

There are two types of goals identified in WIA. These are (1) goals set and counted towards performance (skill attainment) and (2) goals that are personal in nature for the participant.

The goals not counted for skill attainment performance include:

- Personal goals
- Employment goals
- Career goals
- Educational goals

Personal Goal:	These are goals a youth may set for themselves. They may be specific to the youth or to the youth's family. An example of a personal goal is: John will volunteer at homeless shelter.
Employment Goal:	These are goals a youth may set in terms of a specific job or a particular field. An example of an employment goal is: Betsy will explore jobs in the Housing Industry.
Career Goal:	These are goals a youth may set in terms of what they want to do when they finish their formal education. An example of a career goal is: Ashley wants a Career in the Health Care Industry.
Education Goal:	These goals relate to academic achievement, as well as developing life-long learning skills important for success. Examples of educational goals are: Jane wants to improve school attendance, become a tutor or enroll in self-development classes.

One of the core indicators of performance for younger youth is skill attainment. These goals must relate to basic skills, occupational skills or work readiness skills. Skill attainment goals must be based on an objective assessment. If a younger youth is basic skill deficient, the youth must have a basic skill goal set. A maximum of three skill attainment goals per year may be set for younger youth performance purposes; however, additional goals may be set. If more than three goals are set, locals must "check" in Automated Systems Support for Employment and Training (ASSET) the three goals they want counted toward performance.

A target date for accomplishing each skill attainment goal must be set. The target date must be no later than one year from the date the goal is set. Progress toward these goals should be continuously assessed. Once a goal has been attained, a subsequent goal should be set.

Skill attainment goals can be classified as short- or long-term goals for performance or reporting purposes. Short-term goals are a series of incremental, interim, measurable milestones and action steps that enable the young person to experience regular "wins". The goals are used to determine if actual progress is being made toward the participant's established goals in the Individual Service Strategy (ISS). Short-term goals are linked to skill attainment in the areas of basic skills, occupational skills and work readiness and must be attainment within one year from the date set to be counted as a positive result. Short-term goals can be attained in a shorter period of time, such as two or three months. The goals should be reassessed and updated as the participant moves through the program.

Long-term skill attainment goals must relate to short-term youth outcome measures. The goals are set around educational attainment, placement in employment, education and/or training. Long-term goals are more exit-oriented and address desirable outcomes that set the criteria for deciding when the participant needs no additional services, other than follow-up. A series of short-term goals that count for performance should lead to attainment of the long-term goal.

Categories of skill attainment goals used for performance purposes include:

- Basic skill goals
- Occupational skill goals
- Work readiness skill goals

Basic skill goal:

Basic skill goals are set to reflect a measurable increase in basic education skills, including reading, comprehension, math computation, writing, speaking, listening, problem solving, reasoning and the capacity to use these skills.

Occupational skill goal:

Occupational skill goals measure growth in either of two types of occupational skills.

1. Primary occupational skills encompass the proficiency to perform actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels.
2. Secondary occupational skills entail familiarity with and use of set-up procedures, safety measures, work-related terminology, record keeping and paperwork, formats, tools, equipment and breakdown and clean-up routines.

Work readiness skill goals:

Work-readiness skill goals include the world-of-work awareness and the following:

1. Positive work habits, attitudes and behaviors, i.e., punctuality, regular attendance, getting along with others, presenting a neat appearance, exhibiting good conduct, following directions and completing tasks, accepting constructive criticism from supervisors and co-workers, showing initiative and reliability and assuming the responsibilities involved in maintaining a job;
2. Developing motivation and adaptability;
3. Obtaining effective coping and problem-solving skills;

4. Acquiring an improved self-image;
5. Labor market knowledge;
6. Occupational information;
7. Values clarification and personal understanding;
8. Job search techniques (resume writing, interviewing skills, filling out job applications and follow-up letters); and
9. Career planning and decision making

How skill attainment goals relate to reporting goals in ASSET

Sound case management and service provision should include planning through short- and long-term goal setting. Because ASSET is intended to serve as a case management tool from which performance results, programs are managed and federal reports can be produced, there are some functions and data elements that can't be too narrowly prescribed. The case managers share responsibility for understanding the performance measurement system, good participant reporting practices and the benefits of an ISS that integrates both short and long-term goals.

Examples of Short-and Long-Term Goals Linked to Skill Attainment

Short-term basic skill goals	Long-term basic skill goals
Increase one grade level in Math	Receive high school equivalency diploma (HSED)
Increase English proficiency by successfully Completing two English courses	Receive General Education Degree (GED)
Successfully complete all course requirements to obtain a high school diploma	Receive four-year college degree
Return to high school and successfully Complete Senior year	Receive high school diploma
Successfully complete one-week workshop in Financial Literacy	Receive associate degree in Banking
Successfully complete 6 week writing course	Receive four-year college degree in English
Improve speaking skills	Receive four-year degree in Teaching
Master multiplication tables through 9 x 9	Compete in state Math Contest
Short-term occupational skill goals	Long-term occupational skill goals
Successfully complete Pre-apprenticeship training	Successfully complete apprenticeship program in plumbing
Successfully complete three health classes	Successfully complete state certified co-op in health care education
Successfully complete certified nursing Assistant classes	Receive associate degree in Nursing
Successfully complete certified baby sitting class	Successfully obtain license to operate a child care facility
Successfully complete carpentry classes	Obtain a job in housing industry
Successfully complete workshops on repairing small engines	Open business repairing small engines
Learn work-related terminology for the Heat and Air Conditioning Industry	Obtain job in the Heat and Air Conditioning business
Short-term work readiness skill goals	Long-term work readiness skill goals
Learn to create and use spread sheets	Successfully pass the Certified Public Accountant exam
Attend a workshop on safety procedures in the Workplace	Write a safety procedures manual
Obtain skills in operating a chop saw	Receive associate degree in wood working
Obtains drivers license	Successfully complete training to obtain a commercial driving license
Increase teamwork skills through participating on a softball team every Tuesday and Wednesday nights	Pass test to be certified as an umpire
Improve showing accountability and reliability	Arrive for work on time for 20 consecutive days
Attend classes on coping skills	Better handle stress
Successfully resolve a problem with lack of Dependable transportation	Purchase a car

Attachment B
WORKFORCE INVESTMENT ACT (WIA)
DEFINITIONS PERTAINING TO YOUNGER YOUTH SKILL ATTAINMENT

ADVANCED TRAINING – An occupational skills employment/training program, not funded under Title I-B of the WIA, which does not duplicate training received under Title I. This includes only training outside of the One-Stop, WIA and partner system (i.e., training following exit).

BASIC SKILLS DEFICIENT – An individual that computes or solves problems, reads, writes or speaks English at or below the 8th grade level on a generally accepted standardized test or a comparable score on a criterion referenced test; or is unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual's family or in society. NOTE: Grade level scores below 9.0, i.e., 8.9, should be considered as at or below the 8th grade level.

BASIC SKILLS GOAL – Measurable increase in the basic education skills, including reading comprehension, math computation, writing, speaking, listening, problem solving, reasoning and the capacity to use these skills.

CASE MANAGEMENT – The provision of a client-centered approach in the delivery of services, designed to prepare and coordinate comprehensive employment plans, such as service strategies, for participants to ensure access to necessary workforce investment activities and supportive services, using, where feasible, computer-based technologies and to provide job and career counseling during program participation and after job placement.

COMMUNITY-BASED ORGANIZATION – A private, non-profit organization that is representative of a community or a significant segment of a community and that has demonstrated expertise and effectiveness in the field of workforce investment.

ELIGIBLE YOUTH – An individual that is not less than age 14 and not more than age 21, is low-income, deficient in basic literacy skills, school dropout, homeless, runaway, foster child, pregnant or a parent, an offender or requires additional assistance to complete an educational program, or to secure and hold employment.

EXITER -A customer that has an inactivation or termination date within the quarter (hard exit date) or that does not receive any WIA-funded or non-WIA funded partner service for 90 days and is not scheduled for future services except follow-up services (soft exit date). Participants may have a gap in service greater than 90 days and be excluded from the core measures due to health/medical conditions and delays before training begins. Once a participant has not received any WIA service for 90 days, except for follow-up services, and there are no future services scheduled (or there is no planned gap in services), then that participant has exited WIA for the purpose of measurement in the exit-based measure.

FAMILY – Two or more persons related by blood, marriage, or decree of court, that are living in a single residence, and are included in one or more of the following categories: (A) a husband, wife and dependent children, (B) a parent of guardian and dependent children; or (C) a husband or wife

FORMAL/STANDARDIZED ASSESSMENT – Are inventories or tests that have been developed by experts according to scientific principles of test construction. Formal assessments identify interests, abilities, skills, work values, personalities, career beliefs, and career maturity.

HIGH SCHOOL DIPLOMA EQUIVALENT - A General Education Diploma (GED) or High School Equivalency Diploma (HSED) recognized by the state.

INDIVIDUAL SERVICE STRATEGY - Identifies the educational and employment goals, appropriate achievement objectives and combination of activities/services for youth to achieve their goals.

INFORMAL ASSESSMENT – Are subjective, are helpful in obtaining information about dreams, goals, strengths, interests, fears, feelings, perceptions, family and peer interaction, prior work experience, challenges, and supportive services.

INTAKE/ENROLLMENT - Process to determine eligibility, collection of core identification and demographic information and conducting an initial assessment of the youth's needs and career goals.

OBJECTIVE ASSESSMENT - Process that identifies service needs, academic levels, goals, interests, skill levels, abilities, aptitudes and supportive needs and measures barriers and strengths.

OCCUPATIONAL SKILLS GOAL - The proficiency to perform actual tasks and technical functions required by certain occupational fields at entry, intermediate or advance skill levels. Secondary occupational skills entail familiarity with and use of set-up procedures, safety measures, work-related terminology, record keeping and paperwork, format, tool equipment and materials and breakdown and clean-up routines.

OFFENDER – Any adult or juvenile (A) that is or has been subject to any stage of the criminal justice process, for whom services under WIA may be beneficial, or (B) that requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction.

OUT-OF-SCHOOL YOUTH – (A) an eligible youth that is a school dropout, or (B) an eligible youth that has received a secondary school diploma or its equivalent but is basic skills deficient, unemployed or underemployed.

PARTICIPANT - An individual that has been determined to be eligible to participate in and that is receiving services (except follow-up services authorized under WIA) under a program authorized by WIA. Participation shall be deemed to commence on the first day, following determination of eligibility, on which the individual began receiving subsidized employment, training or other services provided by WIA.

POST-SECONDARY EDUCATION - A program at an accredited degree-granting institution that leads to an academic degree (e.g. AA, AS, BA, BS). Does not include programs offered by degree-granting institutions that do not lead to an academic degree.

QUALIFIED APPRENTICESHIP - A program approved and recorded by the U.S. DOL (Employment and Training Administration)(ETA)/Bureau of Apprenticeship and Training

(BAT) or by a recognized State Apprenticeship Agency (State Apprenticeship Council). Approval is by certified registration or other appropriate written credential.

SHORT-TERM GOAL -Series of action steps/activities a youth must take to accomplish a long-term goal.

SKILL ATTAINMENT - A WIA performance measure for 14 –18 year old younger youth. One goal minimum per year is required for all in-school youth and any appropriately assessed out-of-school youth that need to attain basic skills, occupational skills or work readiness skills. A maximum of three goals per year may be set for purposes of the youth skill attainment measure. Goals should be set at the point of assessment. Additional goals may be set after assessment when called for by the youth's ISS or when initial goals are attained.

SUPPORTIVE SERVICES – Services such as transportation, childcare, dependent care, housing, and needs-related payments, that are necessary to enable an individual to participate in activities authorized under WIA.

WORK-READINESS SKILLS GOALS - Include world of work awareness, labor market knowledge, occupational information, values clarification and personal understanding, career planning and decision making and job search techniques (resumes, interviewing, applications and follow-up letters). They also encompass survival/daily living skills such as using the phone, telling time, shopping, renting an apartment, opening a bank account and using public transportation. They also include positive work habits, attitudes and behaviors, such as punctuality, regular attendance, presenting a neat appearance, getting along and working well with others, exhibiting good conduct, following instructions and completing tasks, accepting constructive criticism from supervisors and co-workers, showing initiative and reliability and assuming the responsibilities involved in maintaining a job. This category also entails developing motivation and adaptability, obtaining effective coping and problem-solving skills and acquiring an improved self image.

Attachment C
**SUMMARY OF U.S. DOL TRAINING AND EMPLOYMENT GUIDANCE LETTERS
(TEGLs)
and
DEPARTMENT OF WORKFORCE DEVELOPMENT
DIVISION OF WORKFORCE SOLUTIONS WORKFORCE PROGRAM GUIDE - WIA
YOUTH PROGRAM**

TEGL 3 – 99

- Program guidance on implementing comprehensive youth services
- Provides guidance transitioning Job Training Partnership Act (JTPA) to Workforce Investment Act (WIA)
- Provides guidance converting youth competencies under JTPA to WIA skill attainment goals
- Provides examples of converting youth competencies to skill attainment goals
 1. Basic education skills JTPA equivalent to WIA basic skill goals
 2. Pre-employment and work maturity skills JTPA equivalent to WIA work readiness skill goals
 3. Job-specific skills JTPA equivalent to WIA occupational skills goal

TEGL 7 – 99

- Provides guidance on core and customer satisfaction performance measures
- Provides operational parameters for younger youth skill attainment
 1. In-school and any out-of-school assessed to be in need of basic, work readiness and/or occupational skills counted in performance measures
 2. Younger youth, basic skill deficient, must have basic skill goal set per year
 3. Maximum three goals per year
 4. Goal categories: basic, work readiness and occupational skills
 1. Participants with any combination of three types of goals
 - A) Three skill goals same category
 - B) Two skill goals one category and one skill goal in another
 - C) One skill goal each category

TEGL 9 – 00

- Provides guidance on competitive and non-competitive procedures for providing youth activities under WIA, Title I
- Provides guidance on the program design framework
 1. Intake activities such as;
 - Registration
 - Eligibility determination
 2. Objective assessment
 - Identifies service needs,
 - Academic level goals

2. Individual Service Strategy (ISS)

- Identifies employment goals
- Educational objectives
- Prescribes appropriate services

TEGL 18 – 00

- Provides program guidance on implementation comprehensive youth services
- Provides guidance on enhancing assessment strategies

TEGL 28 – 01

- Provides program guidance on implementation of comprehensive youth services
- Provides guidance on enhancing program performance
- Provides guidance on intake
- Provides guidance on participation in program elements
- Provides guidance on skill attainment
 1. Closely tracking skill attainment for interim way to monitor performance
 2. Skill attainment, particularly in academic areas and positively correlating diploma acquisition and exit placement outcomes
 3. ISS as key tool to track skill attainment and successful completion of short- and long-term goals

DWD/DWS Workforce Program Guide/Section III, Youth Programs

- Provides information on:
 1. Assessment
 2. Individual Service Strategy (ISS)
 3. Skill attainment goals
 4. Program design
 5. Goal setting and performance measures

APPENDIX A

COUNCIL ON WORKFORCE INVESTMENT MEMBERSHIP LIST

- Jim Doyle, Governor, State of Wisconsin
- Paul A. Linzmeyer, Council Chair, Bay Towel Inc., Green Bay
- Lyle A. Balistreri, President, Milwaukee Building & Construction Trades Council, Milwaukee
- Elizabeth "Libby" Burmaster, State Superintendent, Wisconsin Department of Public Instruction
- Thomas L. Burse, President, Buveck Consultants/Construction Managers, Milwaukee
- Daniel Clancy, President, Wisconsin Technical College System
- Rodney Copes, General Manager, Harley Davidson-Tomahawk Operations, Wausau
- Terry Craney, Executive Director, Wisconsin Governor's Work-Based Learning Board
- Jewel Currie, Director of Field Support, WE Energies, Milwaukee
- Kathleen Drengler, Manager of Training and Development, Greenheck Fan Corp., Wausau
- Barbara Fleisner, Executive Director, Marshfield Area Chamber of Commerce, Marshfield
- Matthew J. Frank, Secretary, Wisconsin Department of Corrections
- Roberta Gassman, Secretary, Wisconsin Department of Workforce Development
- Joseph Gilles, Chief Executive Officer, Wausau Insurance, Wausau
- James Haney, President, Wisconsin Manufacturers and Commerce (WMC), Madison
- State Senator Dave Hansen, District 30, Green Bay
- Susan Hatch, President, Hatch Staffing Services, Milwaukee
- John Heyer, President and Owner, Kettle Moraine Coatings, Jackson
- James P. Hill, Executive Director, La Crosse Area Development Corporation, La Crosse
- Ellen Holt, Director of Employee Relations and Recruitment, Gundersen Lutheran, La Crosse
- Jerry Johnson, Chief Executive Officer, 10 Rivers Corporation, Bayfield
- Tina Koehn, Vice President, UMOs Inc., Menomonee Falls
- Donald W. Layden, Jr., President, NuEdge Systems, Wauwatosa
- State Senator Joe Leibham, District 9, Sheboygan
- Xiong Lo, Co-owner, APN Laboratories, Schofield
- Douglas Moquin, Consultant on Business, Community and Workforce Development, Phillips Plastics Corporation, Phillips
- Helene Nelson, Secretary, Wisconsin Department of Health and Family Services
- Cory Nettles, Secretary, Wisconsin Department of Commerce
- Phil Neuenfeldt, Secretary-Treasurer and Legislative Director, State AFL-CIO, Milwaukee
- Kent Olson, President and Owner, Olson Tire & Auto Services Inc., Wausau
- Richard Oulahan, Executive Director, Esperanza Unida, Inc., Milwaukee
- Sally R. Peltz, President, Legacy Redevelopment Corporation, and Principal, Legacy Bancorp, Milwaukee
- Lee Rasch, President, Western Wisconsin Technical College, La Crosse
- Mark Reihl, Executive Director, Wisconsin State Council of Carpenters, Madison
- Joel Rogers, Professor, University of Wisconsin-Madison
- Donald L. Rouse, retired Vice President Corporate Operations, Kohl's Department Stores, Hartland
- Christopher A. Ruud, Executive Vice President, Ruud Lighting, Racine
- Patrick J. Schillinger, President, Wisconsin Paper Council, Neenah
- James Schramm, Mayor, City of Sheboygan
- John Scocos, Secretary, Wisconsin Department of Veterans Affairs
- Georgann Stinson, Vice President of Operations, General Converters & Assemblers, Racine
- Jane E. Svennevig, Vice Chair, Beloit Chamber of Commerce, Beloit

- Julia H. Taylor, President, Greater Milwaukee Committee, Milwaukee
- Norma Tirado, Vice President, Employee Services and Organizational Development, Agnesian Healthcare, Fond du Lac
- David Vierthaler, Director, Bemis Operations H.R., Bemis Company, Inc., Oshkosh
- Dean Welch, Director of Staffing, IT Convergence, Madison
- Joan Wilk, Associate Professor, College of Nursing, University of Wisconsin-Milwaukee
- State Representative Josh Zepnick, District 9, Milwaukee

APPENDIX B

COUNCIL ON WORKFORCE INVESTMENT VISION AND MISSION

Vision Statement

Wisconsin's effective, agile workforce investment system supports career ladder opportunities and prepares a highly educated, skilled, motivated workforce for a vibrant, globally competitive economy and an exceptional quality of life for all citizens.

Mission

- Provide Strategic Leadership
- Prepare for the Future
- Support the Changing Workplace
- Ensure State and Regional Success

The Council on Workforce Investment will **provide strategic leadership** to support the Governor's Grow Wisconsin plan that includes:

- Increasing education, skills and wages
- Focusing on the future economy
- Making smart and strategic regional decisions
- Fostering entrepreneurship

The Council will **prepare for the future**, primarily through the Emerging Opportunities committee, by:

- Identifying the workforce skill needs of emerging industries
- Preparing the workforce of tomorrow to obtain those skills

The Council will **support the changing workplace**, primarily through the Current Workforce committee, by:

- Identifying skill gaps to focus training and retraining resources
- Developing innovative strategies to address changes in the workplace

The Council will **ensure state and regional success**, primarily through the Workforce System Design committee, by:

- Targeting resources in key growth industries in different regions of the state
- Ensuring a comprehensive, effective and accountable workforce system to deliver the education and training services to achieve the vision.

The Council will establish and achieve the goals of this vision and mission, primarily through the oversight and leadership of the Executive Committee, by:

- Establishing a strategic public-private partnership approach
- Using benchmarking and continuous improvement to measure progress and success
- Focusing on both short and long goals and benefits
- Ensuring a comprehensive approach to Wisconsin's workforce system

Approved by the Council on Workforce Investment on May 27, 2004

APPENDIX C

COUNCIL ON WORKFORCE INVESTMENT DRAFT EXECUTIVE ORDER

EXECUTIVE ORDER

Recommended by the CWI on September 10, 2004

WHEREAS, the State of Wisconsin recognizes that economic health, growth, and global competitiveness are dependent on a highly skilled workforce; and

WHEREAS, Wisconsin recognizes that a highly skilled workforce capable of attracting and sustaining quality industries and promoting economic growth is dependent on quality education, employment and training systems; and

WHEREAS, the quality and preparedness of the Wisconsin workforce are the shared responsibility of many people and organizations, both public and private, at the state and local levels; and

WHEREAS, Wisconsin has a need for a coordinated and comprehensive approach to workforce development, utilizing federal, state and local resources in conjunction with our economic development goals and strategies; and

WHEREAS, a coordinated system will better meet the needs of those it serves, including the needs of employers for skilled workers, and the needs of workers, including new entrants into the labor force, incumbent workers and those seeking employment; and

WHEREAS, building a workforce investment system recognizes the strong need for preparing our youth and providing high quality post-secondary education and other initiatives, which develop skilled workers and high performance workplaces; and

WHEREAS, the federal Workforce Investment Act of 1998 (hereinafter "WIA," Public Law 105-220) requires that a multitude of workforce preparation and development programs form the foundation of the system to deliver the state's training, education and employment programs in a single, customer-focused, user friendly service system; and

WHEREAS, a high quality, continuously improving, and comprehensive workforce system in Wisconsin necessitates a state workforce council with strong business leadership, commitment and collaboration of business, labor, state and local government, educational institutions, and workforce-related organizations;

NOW, THEREFORE, I, JIM DOYLE, Governor of the State of Wisconsin, by the authority vested in me by the Constitution and laws of this State, and specifically by Section 14.019 of the Wisconsin Statutes, do hereby:

1. Create the Governor's Council on Workforce Investment (hereinafter "Council");
2. Provide that the Council shall consist of members appointed in accordance with 29 U.S. Code section 2821, and that the Council may include additional members concerned with workforce development, as the Governor may so designate;
3. Direct that the Council shall meet the criteria and carry out the duties and functions prescribed in WIA, Public Law 105-220;
4. Direct that all appropriate state agencies work together on the Council and at the local level to develop a strong, skilled workforce for Wisconsin's future;
5. Direct that the Council also advise the Governor on workforce development strategy and policy and undertake research and other activities to enhance the operation and performance of workforce programs in the state;

6. Direct the Council to provide direction and guidance for the Wisconsin Forward Award to advance high performance workplaces and advance other initiatives to support a skilled workforce. In carrying out these responsibilities the Council on Workforce Investment may establish necessary public-private partnerships to provide ongoing operating support to the Wisconsin Forward Award and other initiatives;
7. Direct that the Wisconsin Department of Workforce Development, as the lead agency, shall provide staff support for the Governor's Council on Workforce Investment, with assistance from other agencies as appropriate; and
8. Direct the Secretary of the Department of Administration to provide the Council with such sums of money as are necessary for travel and operating expenses in accordance with section 20.505(4)(ba) of the Wisconsin Statutes.

IN TESTIMONY WHEREOF, I have hereunto set my hand and caused the Great Seal of the State of Wisconsin to be affixed. Done at the Capitol in the City of Madison this – day of ---in the year two thousand and four.

Jim Doyle, Governor