

## **Part Two: W-2 and Related Programs Plan**

### **Section Two: Program Plan**

#### **Subsection A: Balance of State Response Items**

##### **2.A.1 Agency Case Management Philosophy**

###### **Summary:**

W-2 Contract Agencies must provide W-2 services through mutually respectful partnerships with applicants and participants.

###### **Response Items:**

- a) Describe your agency's case management philosophy on engaging applicants and participants in order to provide quality individualized services. Include in your response how your agency will ensure each staff member is adhering to your agency's philosophy.
- b) Describe how your agency will assist applicants and participants to recognize their strengths, assets, aspirations, resiliency and potential to achieve economic stability.

##### **2.A.2 Connect Individuals to Work and Careers and Helping Individuals Maintain Employment**

###### **2.A.2.1 Initial Assessment of Need and Capacity to Work**

###### **Summary:**

To help a parent get and keep a job, the W-2 Contract Agency must first understand what brought that parent to the W-2 program. The W-2 Contract Agency must go through a comprehensive process to gather information on immediate needs and the parent's capacity to work. Included in the initial information gathering process is an understanding of any household challenges that are making it difficult for the parent to get or keep a job.

###### **Response Items:**

- a) Describe how your agency will determine an applicant family's immediate needs and how you and the applicant will address those needs. Include a description of the services and service referrals your agency will provide to applicant families.
- b) Describe how your agency will assess the strengths of the family and parent's readiness for work. Include how and when your agency will conduct an Educational Needs Assessment.
- c) Describe the methods your agency will employ to ensure barriers to employment are identified. Include in this description how and when your agency will offer the Barrier Screening Tool (BST) and how your

agency will ensure that the BST is offered in a positive, inviting manner that encourages participation.

- d) Describe what staff within your agency will perform the initial screening and assessment and what experience and training qualifies them to perform this function.

### **2.A.2.2 Up-Front Employment Search**

#### **Summary:**

The W-2 Contract Agency should immediately engage those who may be able to find work. The W-2 Contract Agency must work with appropriate individuals to provide individualized job search activities as part of the application process. The goal is to move individuals in the direction of employment through the provision of quality up-front services based on each job seeker's assessed strengths, needs and individual circumstances. A W-2 Contract Agency must not require W-2 applicants or participants to conduct an up-front job search such that the effect is to delay, during the job search, the individual's participation in and receipt of payments in W-2.

#### **Response Items:**

- a) Describe how your agency will identify which applicants are appropriate for and can benefit from participating in up-front job search.
- b) Describe up-front job search and job readiness activities and workshops that will be offered, when they will be offered and the setting in which they will be provided. Include your process for tailoring these up-front activities to the needs of the applicant.
- c) In the event that an applicant has recently lost a job, describe how your agency will assist to quickly reattach to employment. Include a description of how your agency will take the job loss into consideration in the assessment of employability.
- d) Describe what staff within your agency will provide up-front employment search activities and what experience and training qualifies them to perform this function.

### **2.A.2.3 W-2 Placement Decisions, Case Management, and Ongoing Assessment**

#### **Summary:**

The W-2 Contract Agency must work with the participant using informal and formal assessment results to make an appropriate W-2 placement (Unsubsidized Employment, Trial Jobs, Community Service Job [CSJ] and W-2 Transition [W-2T]).

For agencies to be successful they must quickly establish and maintain a supportive working relationship with the participant. This is done through

intensive, quality case management services provided in a culturally sensitive manner and individualized to the needs and capabilities of each W-2 participant. W-2 Contract Agencies must use the information gathered throughout the parent's participation and experiences in W-2 to work with the parent to regularly reassess their placement.

**Response Items:**

- a) Describe how your agency will include the W-2 applicant/participant in the W-2 placement decision process.
- b) Describe how your agency will provide ongoing informal assessments and use the information to work with the participant to identify any needed changes in W-2 placement. In your response cite the specific tools your agency will use.
- c) Describe your agency's methods for obtaining formal assessments for participants with more severe barriers to employment (e.g. qualified assessment staff, sub-contracts with assessment providers, referrals to community based providers, etc.).
- d) Describe how your agency will ensure that each individual participating in a W-2 employment position is engaged in high quality case management services. Include the frequency and mode of contact your agency will provide.
- e) Describe what staff within your agency will engage applicants/ participants in placement decisions, case management and ongoing assessments and what experience and training qualifies them to perform these functions.

**2.A.2.4 Connect Individuals to Career Path**

**Summary:**

The W-2 Contract Agency is responsible for engaging applicants/ participants in a process to develop their career plans and assess their educational needs. Agencies must provide services that assess the applicants' and participants' career interests and aptitudes. By the end of the career planning process, the plan should include both long-term and short-term career goals with action steps/objectives and the appropriate combination of services and training needed to achieve each goal.

**Response Items:**

- a) Describe how your agency will engage participants completing career assessments and in helping the participant develop and plan his/her long-term career goals. Include what career planning activities will be offered, when they will be offered and the setting in which they will be provided (e.g., individual or group, etc.), and how your agency will do this within the broader workforce development/job center system.

- b) Describe how your agency will help the participant identify the short-term goals and action steps needed to accomplish the participant's long-term goals.
- c) Describe how your agency will continue to engage the participant over time to review and adjust their long- and short-term goals based on their participation and experience in W-2 activities.
- d) Describe what staff within your agency or within the broader workforce development/job center system will conduct career planning activities, and what experience and training qualifies them to perform these functions.

### **2.A.2.5 Employability Planning**

#### **Summary:**

The W-2 Contract Agency must work with the applicant/participant to develop an Employability Plan (EP) before assigning the individual to up-front job search and/or when placing the individual in a W-2 employment position.

The EP includes the applicant/participant's long-term career goal identified through the career planning process. The activities recorded on the EP focus on steps needed to achieve the participant's short-term employment goals.

An EP should be considered a living document. The activities recorded on the EP reflect the individual's current goals and activities. Throughout an individual's participation in W-2, the W-2 Agency is continually gathering information about the individual's capacity to work through formal and informal assessments, through the case management relationship, and through the individual's experience participating (or failing to participate) in assigned activities including work experience. This information must be used as the basis for reassessing with the participant his/her assigned activities.

#### **Response Items:**

- a) Describe how assessments, the individual's past participation, and local labor market information will be used when working with the applicant/participant in employability planning.
- b) Describe how your agency will work with W-2 participants to ensure that the assigned activities align with the participant's unique skills, interests, capabilities, career goals and other life circumstances. Include how your agency will engage participants in appropriate activities for up to 40 hours per week.
- c) Describe how your agency will ensure that participants have the necessary supportive services, accommodations, auxiliary aids and communication assistance required to participate to the fullest extent possible in assigned activities.

- d) Describe the approach your agency will take to assist the W-2 participant in balancing family life responsibilities and work activities.
- e) Describe what staff within your agency will engage applicants/ participants in the development and ongoing maintenance of the EP and what experience and training qualifies them to perform these functions.

#### **2.A.2.6 Creating and Managing Work Experience and Trial Job Sites**

##### **Summary:**

W-2 Agencies are responsible for creating and managing work experience and Trial Job sites for all W-2 participants. These sites must provide marketable skills that correlate with the local labor market, and prepare individuals for unsubsidized jobs. The following types of organizations may serve as work experience or Trial Job sites: public sector, private sector, for profit and not for profit employers, faith based organizations, or community based organizations (CBO).

##### **Response Items:**

- a) Describe how your agency will develop relevant work experience and Trial Job sites. Include in your response how your agency will ensure a variety of work sites that will meet participants' career interests, skills and aptitudes and are developed based on local labor market information. Provide examples in your response.
- b) Describe how your agency will monitor the ongoing quality of work experience and Trial Job sites.
- c) Describe how your agency will connect participants to high quality work experience and subsidized employment sites provided by other workforce development partners (e.g., Workforce Investment Act [WIA], Division of Vocational Rehabilitation [DVR]). Provide examples in your response.
- d) Describe how your agency will monitor the participation and progress of each participant at a work site and whether the participant is developing the hard and soft skills they need to obtain and retain unsubsidized employment. Include your role in helping resolve issues that develop at the work site. Also include how your agency will use the information gathered from the participant's experience in the work site to update the EP, career plan, and W-2 placement.
- e) Describe what staff, within your agency or within the broader workforce development/job center system will create and manage work experience and Trial Job sites and what experience and training qualifies them to perform these functions.

### **2.A.2.7 Connecting Individuals to Education and Training**

#### **Summary:**

W-2 Contract Agencies work with participants to connect them with education and training opportunities that will teach job-specific marketable skills in employment sectors that offer a career path. Agencies develop processes to match participants with appropriate education and training using participant education, skills, interests and personal and family circumstances as a guide. Access to training is critical both to participants who are currently unemployed as well as those individuals who are underemployed.

#### **Response Items:**

- a) Describe how your agency will use assessment results to connect participants with appropriate education activities (e.g., adult basic education, General Education Development [GED]/High School Equivalency Diploma [HSED], English as a Second Language [ESL] and adult literacy programs).
- b) For those in adult basic education, GED/HSED, ESL and adult literacy programs, describe how your agency will establish individualized educational goals and measure each participant's progress towards those goals. Include a description of the supports your agency will provide to help participants succeed in reaching their education goals.
- c) Describe how participants' career interests, planning and assessment information will be used to connect them with job skills training that build on their existing skills and aptitudes.
- d) Describe how your agency will develop or identify existing job skills training opportunities and how your agency will coordinate with other public workforce providers to expand training opportunities, including providing assistance in obtaining financial aid. Include how your agency will connect to programs developed through the Regional Industry Skills Education (RISE) Partnership Initiative and how you will connect participants to necessary bridge programs.
- e) Describe how your agency will use the information gathered from the participant's experience in the assigned education and training activities to update the EP, career plan, and W-2 placement.
- f) Describe what staff, within your agency or within the broader workforce development/job center system, will assess individuals for education and training activities and what staff will provide those activities. Include in your response what experience and training qualifies them to perform these functions.

### **2.A.2.8 Employment Retention and Advancement Services**

#### **Summary:**

The W-2 Contract Agency is responsible for working with and coaching W-2 participants to help them learn the skills necessary to retain employment. This responsibility begins the moment the individual enters the W-2 agency and continues throughout program participation including the 12 months after the individual begins unsubsidized employment. Agencies must provide intense, targeted employment stabilization services aimed at helping participants retain employment and pursue advancement opportunities. At a minimum, post employment services must include case management, assistance in accessing education and training to help the participant advance, help in negotiating difficulties on the job. Post employment services may also include financial incentives and supports.

The W-2 Contract Agency is responsible for connecting participants to post employment supports including on-going services and referrals to address issues that arise and could threaten job retention. These services or referrals may include Child Care assistance, FoodShare (FS), Badger Care (BC), Job Access Loans (JAL), and information regarding the state and federal Earned Income Tax Credits (EITC), Homestead Tax Credit.

#### **Response Items:**

- a) Describe how your agency will engage individuals participating in W-2 employment positions in developing job retention skills as they prepare for unsubsidized employment.
- b) Describe the intervention strategies your agency will implement with employed W-2 participants to promote job retention and advancement.
- c) In the event of job loss, describe how your agency will assist individuals to reattach to employment as quickly as possible. Include a description of how your agency will take the job loss into consideration in the on-going assessment of employability and what steps your agency will take when new employment cannot be found.
- d) Describe what services and activities designed to promote advancement opportunities your agency will offer to those who are employed part-time.
- e) Describe what approach your agency will take to provide post employment services to participants who found employment without the help of the W-2 agency. Include how your agency will establish a relationship with the employer, if that is appropriate.
- f) Describe what staff, within your agency or within the broader workforce development/job center system, will provide employment

stabilization and post employment support services and what experience and training qualifies them to perform these functions.

### **2.A.2.9 Develop Relationships and Improve Connections to Employers**

#### **Summary:**

In order to successfully connect W-2 applicants and participants to the workforce, the W-2 Contract Agency must:

- Have thorough knowledge of local labor market information, including high-growth industries and what career paths exist within those industries;
- Identify employers within local industry that are best prepared to work with the W-2 population;
- Understand local industry trends and occupations and have capacity to engage with employers to assist in meeting their recruitment needs; and
- Have ability to identify the skill-sets local industries need for entry-level workers and apply related skill development to work experience and skills training models

#### **Response Items:**

- a) Describe your agency's approach to job development including your approach to identifying work experience sites or subsidized work opportunities, including arranging job interviews and post interview follow up with local employers. Provide Letters of Support from local employers in your response.
- b) Describe the kind of information your agency will gather about the participant in order to match the participant to potential employers.
- c) How does your agency gather information and maintain knowledge about local business trends.
- d) Explain how your agency will participate with employers and other members of the workforce system in the development of sector-based career paths for job seekers.
- e) Describe the services your agency will provide to employers to foster job retention and advancement for employed W-2 participants during the job placement follow up period.
- f) Describe what staff, within your agency or within the broader workforce development/job center system, will provide job development services and what experience and training qualifies them to perform these functions.

### **2.A.3 Provide Assistance for W-2 Participants in Obtaining Supplement Security Income (SSI)/Social Security Disability Insurance (SSDI)**

#### **2.A.3.1 SSI/SSDI Advocacy for W-2 Participants**

##### **Summary:**

Through screening, formal assessment and consultation with other providers of disability-related services, the W-2 Contract Agency is responsible for identifying participants who have a reasonable chance of obtaining SSI/SSDI. When there is agreement between the participant and the agency that the participant is appropriate for SSI/SSDI advocacy, the agency is responsible for assisting with the SSI/SSDI application and appeals process to the extent needed by each participant. SSI/SSDI advocacy must be provided either directly by the agency or through referral to an SSI/SSDI advocate. Access to free and reduced fee legal services should be discussed with the participant before making a referral.

##### **Response Items:**

- a) Describe the tools and method(s) your agency will use to identify participants who are appropriate candidates for SSI/SSDI application.
- b) Describe the SSI/SSDI advocacy services that will be offered either within your agency or through external sources. Include the services that will be offered as part of the initial application for SSI/SSDI and services that will be offered when a participant chooses to appeal an initial denial of SSI/SSDI eligibility (levels of appeal include Reconsideration, Hearing, and Appeals Council Review).
- c) Describe how your agency will review and monitor the progress of the SSI/SSDI application process for participants receiving SSI advocacy, including those participants receiving SSI advocacy from an external source. Also, if the SSI advocate is from an external source, describe how your agency will ensure that the SSI Advocate has case information that may impact the SSI/SSDI decision results.
- d) Describe what staff, within your agency or through external sources, will provide SSI advocacy and what experience and training qualifies them to perform these functions. If external sources will be used, identify the source and the relationship your organization has with that source(s).

#### **2.A.3.2 W-2 Case Management for Participants Receiving SSI/SSDI Advocacy**

##### **Summary:**

Participants appropriate for SSI/SSDI advocacy have disabilities that may require the W-2 agency to provide a more intensive case management approach.

The W-2 Contract Agency is required to provide services to support the smooth transition of participants moving from W-2 to SSI/SSDI.

**Response Items:**

- a) For participants receiving SSI advocacy, describe your agency's process for reviewing appropriateness of assignment of activities and frequency of contact with the participant.
- b) Describe the process your agency will use to ensure W-2 participants in this track continue to receive appropriate case management services including, but not limited to formal assessments, ongoing informal assessments, support services, and assigned activities such as counseling and treatment, education and training, work experience, and parenting and life skills.
- c) Describe the process your agency will use to redirect a participant who has been denied eligibility for SSI/SSDI (which may include exhausting one or more levels of the appeal process) towards an employment focus and possible referrals to other community resources.
- d) Describe how your agency will work with the participant to create a transition plan that identifies resources that will address personal and family related needs.
- e) Describe what staff within your agency, or through external sources, will provide case management to participants on the SSI/SSDI track and what experience and training qualifies them to perform these functions. If external sources will be used, identify the source and the relationship your organization has with that source(s).

**2.A.4 Integration of Services**

**2.A.4.1 Service Integration with the Public Workforce System**

**Summary:**

W-2 and Related Programs must be connected to the Job Center system. In addition, W-2 Contract Agencies must establish and maintain effective relationships with other workforce system programs serving families in common. Integration of services across programs and providers will reduce duplication of effort across agency roles, and result in improved employment outcomes.

**Response Items:**

- a) Describe how your agency will connect to the Job Center system.
- b) Describe how your agency will collaborate with the following entities in order to maximize employment outcomes. Include in your response your agency's plan for collaborating with all identified service providers throughout the contract period:
  - Job Service programs;

- FoodShare Employment and Training (FSET) programs;
- Refugee Employment and Training providers, and other services provided by Voluntary Resettlement Agencies (VOLAG) and Mutual Assistance Associations (MAA);
- Workforce Development Boards and services provided through WIA Programs, including Youth, Adult and Dislocated Work Programs including co-enrollment efforts;
- Adult literacy providers;
- Adult job training administered by the Technical Colleges;
- RISE Partnership for Wisconsin;
- Vocational rehabilitation administered by the Department of Workforce Development's DVR;
- Veteran's Employment and Training;
- Job Center Employer Relations Teams;
- Community Action Program (CAP) Agencies; and
- Other local and regional business associations, community based organizations, and economic development programs

#### **2.A.4.2 Service Integration with Other Work Support Service Providers**

##### **Summary:**

W-2 participants are often connected to other local workforce support services. The W-2 Contract Agency is responsible for ensuring that those services are coordinated with the W-2 Contract Agency's services. To do this, the W-2 Contract Agency must establish and maintain effective relationships with other workforce support service providers serving families in common. Integration of services across programs and providers will reduce duplication of effort across agency roles, and result in improved employment outcomes.

##### **Response Items:**

- a) Describe how your agency will coordinate with the programs administered by the county or tribe, including FoodShare (FS), BadgerCare Plus (BC+), Medicaid, Child Support (CS), and child care administration.
- b) Describe how your agency will identify and collaborate with community resources and programs to provide workforce support services to assist W-2 participants in addressing family and work-related needs including:
  - CAP Agencies;

- Refugee Employment and Training programs, such as VOLAGs and MAAs, that provide job readiness and post employment services;
- Other workforce support services that provide additional support focused on ensuring success in the workforce:
  - Federal EITC and Wisconsin Earned Income Credit programs;
  - Adult literacy services;
  - Transportation services;
  - Housing services;
  - Domestic violence services;
  - Mental Health services, including refugee mental health programs;
  - AODA services;
  - Emergency services; and
  - Other services including volunteer organizations
- c) Describe how your agency will develop and maintain a working relationship with local Social Security Administration and Disability Determination Board (DDB).

#### **2.A.4.3 Service Integration with Child Welfare Services**

**Summary:**

W-2 and Related Programs must be integrated with Child Welfare services and Child Abuse and Neglect prevention services.

**Response Item:**

- a) Describe how your agency will identify families currently receiving services from both W-2 and Child Welfare programs, and families who have received services from both programs during the past three months, although during that time period the services may not have been simultaneous from both programs.
- b) Describe how your agency will integrate services with Child Welfare services; including child abuse and neglect prevention services, in home child welfare safety services and out-of-home child welfare services for the families identified in question a) above. Include in your response how your agency will integrate services so that the W-2 Employability Plan is consistent, whenever possible, with the Child Welfare family case plan. Also describe how your agency staff will actively participate in coordinated service team meetings.
- c) Describe the process you will develop to share relevant assessments and coordinate referrals to needed services, such as AODA, mental

health and other service providers. This includes ensuring that services provided by both systems are not duplicated.

- d) Describe what staff within your agency will coordinate/integrate W-2 and Related Programs services with child welfare services, and what experience and training qualifies them to perform these functions.

#### **2.A.5. Wisconsin Shares Improper Payments Program**

##### **Summary:**

The Department of Children and Families and the U.S. Department of Health and Human Services (DHHS), Administration for Children and Families are working together to address improper payments in the Wisconsin Shares child care eligibility process.

##### **Response Item:**

- a) Describe how your agency will monitor Wisconsin Shares eligibility determination in order to ensure that eligibility is determined accurately.

#### **2.A.6 Refugee Assistance Programs (RAP)**

##### **Summary:**

The W-2 Contract Agency will be responsible for administration of Refugee Assistance Programs (RAP) including Refugee Cash Assistance (RCA) and Refugee Medical Assistance (RMA) to eligible refugees in accordance with Federal rules and regulations.

##### **Response Item:**

- a) Describe how your agency plans to administer RCA and RMA eligibility determinations, including who will determine eligibility.
- b) Describe how your agency plans to refer participants to and coordinate services with VOLAGs, FSET and other local employment and training agencies, including Refugee employment and training providers similar to the Milwaukee Area Refugee Consortium (MARC) and the African-Asian Refugee Consortium (AARC).
- c) Describe how your agency will address communication challenges with refugees arriving from non-English speaking countries. Describe whether the agency is going to depend totally on volunteers as interpreters, hire interpreters on a need basis or employ multi-lingual staff.
- d) Describe how your agency will provide culturally sensitive services. Describe the kind of training your agency provides staff to help them develop the skills, awareness and sensitivity needed to build trusting relationships with the refugee applicants/participants who may be reluctant to share personal and family information.
- e) Describe the process your agency will use to develop, where appropriate, written procedural agreements and plans with VOLAGs, refugee employment and training providers, community based, and other organizations as necessary to ensure RAP eligible refugees receive appropriate support and services.

## **2.A.7 Quality Assurance/Improvement Monitoring**

### **Summary:**

All W-2 Contract Agencies must implement an internal monitoring system to assure oversight of the agency's performance of W-2 and related programs. The oversight must include systematic identification and implementation of improvements needed, regular reviews of performance standards outcomes and contract compliance, and timely notification to the BWF Contract Manager of performance problems.

### **Response Items:**

- a) Describe your agency's internal monitoring process to ensure compliance with the Department's W-2 Program policies and procedures and your agency's approved W-2 and Related Programs Plan. Include what will be reviewed and the frequency of those reviews.
- b) Describe your agency's plan to use information from your agency's quality assurance/improvement monitoring process described above, from DCF monitoring, and from other sources such as customer feedback, complaints, Fact Finding process, etc. to assess agency performance and make improvements.
- c) Describe your agency's plan to ensure that changes made to improve program delivery are effective. In addition, explain how your agency will provide this information to the Department.
- d) Describe how your agency will determine whether training for staff has achieved desired outcomes. Include in your response steps your agency will take to provide additional training when needed.

## **2.A.8 Scenarios**

### **Instructions:**

Scenarios that follow include W-2 topics related to:

- Access;
- Ongoing Case Management;
- Social Security Issues; and
- Post Employment Services

Select one scenario from each of the four topic areas and respond in writing to the "Describe..." statement or "How..." question of each selected.

### **Response Items:**

#### **2.A.8.1 Scenarios on Access. Respond to one of the following:**

- a) Ahmad and Najia Khomamiasl: Ahmad and Najia Khomamiasl are from Afghanistan. They are Sunni Muslims who speak Dari and have come to the W-2 agency seeking services. Besides Ahmad and Najia, the family includes a 63-year-old grandmother and three

children, ages 19, 17 and 15. The group has been admitted to the U.S. under Special Immigrant Visas and all have permanent residency cards. They came to the U.S. three months ago and stayed in a motel until they exhausted their savings. They are looking for help with housing, employment, enrollment in school for their children and Medicaid for the grandmother, who is diabetic and cannot move around easily. Ahmad and Najia are college-educated and were well-to-do jewelers. Najia speaks excellent French; no one in the family speaks English. Describe the services your agency might provide to this family.

- b) Marilyn Foster: Marilyn Foster, twenty years old and a single mother of twins, is five months pregnant. The twins are two years old and one of them has been diagnosed with autism. Marilyn has come to the W-2 agency because she was told by friends she could get help with her recently received eviction notice. Marilyn has an 11<sup>th</sup> grade education and has been sporadically employed in various service industries. These jobs have included housekeeping at Holiday Inn, cashier work at a movie theater, as well as at Culver's and Wendy's, and some clerical assignments through a temporary agency. Marilyn was unable to pay her rent last month. She is already receiving FoodShare and BadgerCare. Describe the services your agency might provide to this family.
- c) Jason Petrie: Jason Petrie has come to the W-2 agency after receiving notice that his family's home has gone into foreclosure. He is looking for assistance with finding job opportunities and financial assistance. He had been supporting his family, which includes his wife and their two teenage children, 16 and 17 years of age, until he lost his job as a retail manager seven months ago at Eden Square Mall. This job loss resulted from his inability to return to work while he was recovering from knee surgery. His wife, Lori, has been a homemaker since the birth of their first child and she has also been caring for Jason's father, who has been diagnosed with senile dementia. Jason and Lori both have bachelor's degrees. Describe the services your agency might provide to this family.

**2.A.8.2 Scenarios on Ongoing Case Management. Respond to one of the following:**

- a) Ben Keller: Ben Keller is a single father with a son in 1<sup>st</sup> Grade. He has been in a W-2 CSJ placement for the past 6 months. He recently received custody of his 3-year-old daughter when the girl's mother lost custody due to AODA issues. Ben's past employment history has not included steady work, just odd jobs. Prior to his placement in W-2, he worked primarily on cars for cash. He, his son, and his daughter live with Ben's mother, who works at Children's Hospital and whose work schedule varies. Ben has a GED. While still in high school he displayed a proficiency in mechanics and shop.

Describe how your agency would work with Ben in determining changes in his placement or assigned activities.

- b) Jill Edwards: Jill Edwards is a single mother in a W-2 Job Search CSJ. She has a 6-year-old child. Within a month of her placement, Jill comes to the W-2 office to discuss returning to school. She has two-thirds of her credits completed toward a bachelor's degree in liberal arts, but left school five years ago. She maintains that she would now like to finish up her degree as soon as possible. Describe how your agency would address this request.
- c) Anna Nordstrom: Anna Nordstrom is a single mother currently in a W-2 CSJ placement. Her assigned activities include work experience and job search. Her son, Cliff, is 13 years old and, through testing at school, has been found to have a learning disability. Cliff has also been diagnosed with ADHD. He has been acting out during class and Anna has been called to pick him up from school four times in the last month alone. She has not, on those days, been able to return to the worksite. The worksite supervisor has said that if Anna takes any more time off this month, she would have to seriously consider someone else for the work experience slot, bumping Anna out. How would your agency work with Anna to address her situation?

**2.A.8.3 Scenarios on Social Security Issues. Respond to one of the following:**

- a) Nancy Lexington: Nancy Lexington, divorced and 45 years old, has two children, ages 11 and 15. She had been employed by Morning Meadow Dairy for twenty years. About two years ago, on a day off from work, Nancy fell and injured her back. She has been trying to work through the pain, but it has become very difficult in part because of all the pain medication she has been prescribed. Her doctor has told her that her condition is progressively worsening and has suggested she consider applying for SSDI. Describe how your agency would work with Nancy.
- b) Tulia Rios: Tulia Rios is a first time W-2 applicant. She is a 35-year-old single mother with children aged 17, 12 and 10 years. She reports that she has been diagnosed with Fibromyalgia and is unable to work with her hands or stand or walk for long periods of time. Tulia reports she has been “let go” from her last three jobs because of her inability to perform tasks at the level the employers wanted. She also missed a great deal of work when the pain was too intense. Her most recent job was terminated two months ago. She last saw a doctor three months ago, when she and her children still lived in Kentucky. The family moved to Wisconsin because her mother lives here and her mother has offered to help Tulia with child care. Tulia has never applied for SSI, has no advocate, and does not know what doctor to go see. Describe the services your agency would provide to Tulia.

**2.A.8.4 Scenarios on Post Employment Services. Respond to one of the following:**

- a) Josephine Johnson: Josephine Johnson is a W-2 participant who recently obtained a job on her own. She has a high school diploma and no prior work experience. Her career goals included office/clerical. She was placed in a CSJ and W-2 staff assigned her to activities that included facilitated job search workshops for 10 hours per week and 20 hours per week of work experience at ABC Food Bank, where she checked in nonperishable food items and stocked shelves.

While participating in the work experience activity at the food bank, Josephine became increasingly frustrated because she could not see how the activity was connected to her employment goals. She also did not find value in the job search workshops, unable to see how they could possibly lead to employment. After six months, Josephine stopped participating in the CSJ and did not contact the agency. The agency discovered through the Data Exchange New Hire information that she had been hired by “Got It Maid,” a small, privately-owned commercial cleaning company. After several attempts, the agency finally made contact with Josephine and was able to offer retention services, but Josephine never followed through.

Discuss why post-employment efforts failed. Describe how this case management relationship could have resulted in positive post-employment engagement.

- b) Noquesha Patterson: Noquesha Patterson is a single parent with children aged 3 years and 7 years. As a W-2 participant, she completed a course of customized skills training in security guard enforcement. Upon completion of the training, Noquesha was hired as a security guard at 30 hours per week and was placed in Case Management Follow up (CMF).

The W-2 agency contacts Noquesha on monthly basis to determine if she is retaining her employment and if her hours are the same or if they have increased. At the end of her six-month probationary period, Noquesha reports that, although her employer is satisfied with her job performance, her hours have not increased and her wage has remained at the entry level rate, putting her family slightly above 115% of the Federal Poverty Level.

Describe possible post-employment services that could be provided to Noquesha in order to impact her ability to support her family.

### **2.A.9 Staff Access to W-2 Policy Resources**

#### **Summary:**

W-2 Contract Agencies must establish procedures that ensure all staff who work with W-2 applicants and participants have a working knowledge of the W-2 Manual, all current Bureau of Working Families (BWF) Operations Memos, Division of Family and Economic Security (DFES) Administrators Memos, the Client Assistance for Re-employment and Economic Support (CARES) Guide and other informal communication released through the W-2 Regional Offices that pertain to W-2 case management. Agencies must further ensure that all W-2 staff are able to easily access these documents on an ongoing basis. Note: With the exception of the regional office communication, these documents are all available on DCF's website.

#### **Response Items:**

- a) Describe your procedures for ensuring that all staff have a working knowledge of existing policies and procedures found in the W-2 Manual, BWF Operations Memos and the CARES Guide. Include in this description your process for ensuring that staff become familiar with new policy materials released by the Department via manual releases and memos.
- b) Describe how the staff in your agency who work with W-2 applicants and participants will access the W-2 Manual, BWF Operations Memos, DFES Administrators Memos and the CARES Guide.

### **2.A.10 W-2 Program Guarantees**

#### **Summary:**

The W-2 and Related Programs Contract must be administered in accordance with all applicable laws, codes, policies and procedures. All Proposers must complete Form 11, W-2 Program Guarantees, found in this RFP. By completing the form, you are agreeing that you will comply with all applicable laws, codes, policies and procedures of which you receive notice, including, but not limited to, those found in the following documents:

Wisconsin Statutes	Administrator's Memos
Wisconsin Administrative Code	Income Maintenance Manual (IMM)
W-2 Manual	Child Care Manual
CARES Guide	Other written departmental guidance
Operations Memos	

In addition, W-2 Contract Agencies must have written procedures available for review by the Department upon request.

#### **Response Items:**

- a) Proposers must complete and sign Form 11, W-2 Program Guarantees, found in this RFP.