DEPARTMENT OF CHILDREN AND FAMILIES
DIVISION OF FAMILY AND ECONOMIC SECURITY
ADMINISTRATOR'S MEMO SERIES

DFES 19-03
ISSUE DATE: 3/18/2019
DISPOSAL DATE: 12/31/2019

☒ ACTION
☐ NOTICE

PROGRAM CATEGORIES:

☒ W-2 - Wisconsin Works
☐ RA - Refugee Assistance
☐ CS - Child Support
☐ CF - Children First
☐ TJ - Transitional Jobs
☐ TMJ - Transform Milwaukee Jobs

TO: W-2 Agency Directors

FROM: Connie Chesnik
Division Administrator

RE: Required Training for Wisconsin Works and Related Programs Workers

PURPOSE:

The purpose of this memo is to:

1. Remind W-2 Agencies of their responsibility to ensure that all W-2 workers are trained in accordance with Administrative Rule Chapter DCF 103 W-2 Worker Training.

2. Outline additional training requirements as required by the Bureau of Working Families (BWF).

3. Remind W-2 Agencies of their responsibility to submit an annual report that documents the W-2 -related training activity of each of its workers.

BACKGROUND:

Chapter DCF 103 W-2 Worker Training outlines the training requirements for W-2 workers and supervisors.

The rule specifies that W-2 Agencies that subcontract out a portion of their obligations under the W-2 and Related Programs Contract are responsible for ensuring that the subcontractors also comply with the rule.

For reference purposes, below are definitions taken from the rule of W-2 workers and supervisors:

"Financial and employment planner" or "FEP": a case manager employed by a Wisconsin Works agency directly or by subcontract who determines eligibility, assists in the process of determining eligibility, or performs case management functions. "FEP" includes a case manager who specializes in employment attachment and retention, assists W-2 participants with special needs, or assists W-2 participants with the Supplemental Security Income (SSI) and Social Security Disability Income (SSDI) application process.

"Resource Specialist": a worker employed by a Wisconsin Works agency who performs application entry, provides an initial assessment of a potential W-2 applicant's needs, makes referrals to service providers, or evaluates an individual's need for W-2. "Resource Specialist" may also include a worker employed by an agency contracted with the department to provide access services.

Supervisor: a worker employed by a Wisconsin Works agency directly or by subcontract who supervises W-2 financial and employment planners or resource specialists.

SUMMARY OF TRAINING REQUIREMENTS:

The following is an outline of requirements for both new and experienced W-2 workers and Supervisors:

Requirement	New Workers	New Supervisors	Experienced Workers	Experienced Supervisors
New Worker Training Program appropriate to the specific W-2 job functions they will perform	✓			
New Worker Training Program appropriate to the W-2 job functions of the staff they will supervise		✓		
Case Management courses: 1. W-2 Case Management: Assessment, Employability Plans, and Activity Assignment (FEP) 2. Practical Applications in CWW (FEP) 3. Strategies for Prioritizing W-2 Case Management Tasks (FEP) 4. W-2 Case Management: Attaining the Work Participation Rate (FEP)	✓	✓		
Domestic Abuse (12 hours for FEPs and 6 hours for RSs)	✓	✓		
Enhanced Case Management Training (ECM) (12 hours each year) *(see additional detail below)*			✓	✓

Professional development (12 hours each year) *(see additional detail below)*			✓	✓
Introduction to the Americans with Disabilities Act for W-2*	✓	✓	✓	✓
Introduction to Civil Rights*	✓	✓	✓	✓
Program Security and Confidentiality*	✓	✓	✓	✓
New W-2 policy and refresher training	✓	✓	✓	✓
Wisconsin Works Programs (WWP)			✓	✓

*Note: “Introduction to the Americans with Disabilities Act for W-2” is required upon hire. “Introduction to Civil Rights” is required upon hire and every three years thereafter. “Program Security and Confidentiality” is required upon hire and annually thereafter.

FEPs cannot make independent decisions related to eligibility or perform case management functions until the initial W-2 training is successfully completed. Similarly, RSs cannot make independent decisions related to providing an initial assessment of a potential W-2 applicant’s needs, making referrals to service providers, or evaluating an individual’s need for W-2 until the initial W-2 training is successfully completed.

Enhanced Case Management (ECM) Training

Twelve hours of ECM activities is an annual requirement of all experienced W-2 workers and supervisors within W-2. ECM programs give supervisors and workers the tools to provide quality services to all participants, including participants with special needs.

ECM activities provide an opportunity to examine the employability plan, promote early attachment to the workforce, provide career advising, and design effective post-employment strategies. The Division of Family and Economic Security Partner Training Team (PTT) also promotes a strength-based approach to case management. ECM courses provide training in strategies necessary to assist participants in building on individual strengths.

The PTT offers these topics as classroom programs or through alternate methods. Classroom programs are offered on a regional basis or upon request.

ECM topics are identified as such in the course descriptions.

Professional Development Requirement

A minimum of twelve hours of professional development is an annual requirement of all experienced W-2 workers and supervisors.

Professional development includes, but is not limited to, PTT programs, conferences, technical college courses, seminars, workshops, and/or policy and procedure refresher training. The local agency selects the professional development training and it does not need to be conducted or sponsored by the Department.

Training Equivalencies and Waivers

BWF recognizes that local W-2 Agencies routinely provide their workers with ongoing professional development. To recognize local expertise, PTT awards ECM equivalency and waivers to local agency training efforts.

In order to award a W-2 Agency with an ECM equivalency for agency training efforts that meet ECM intent, agencies must provide PTT with the title of the learning experience, a brief program description, the presenter's name, the number of hours in training, the learning objectives, and the date of the activity.

PTT will waive ECM requirements to local workers engaged in educational programs that provide expertise in case management processes. In order to get a waiver, agencies must provide PTT with the worker's name, a program description, and the number of hours the agency would like waived.

To request an ECM equivalency or a waiver, W-2 Agencies must email the request with the supporting documentation to: Sally Hilsgen (sally.hilsgen@wisconsin.gov).

W-2 Agency Training Liaisons (ATL)

Each W-2 Agency must designate an Agency Training Liaison (ATL) as a part of the agency management team. The ATL acts as the point of contact with the Division's training team and is responsible for the training needs of agency workers, coordinating the logistics for delivery of the Bureau's training programs, and participating in the development and evaluation of the Bureau's training programs. ATLs assist PTT in assessing the training needs of their staff and may participate in the development and delivery of training products.

W-2 Contractors are responsible for the general development of their employees and for training not offered by PTT. It is the W-2 Contractor's responsibility to ensure that workers have the skills needed to perform job functions.

Training Reports and Records

According to rule, W-2 Agencies must submit an annual report that documents training completed by all W-2 FEPS, Resource Specialists, and their supervisors during the previous calendar year. This report must include information on training received by individuals employed directly by the W-2 Agency and individuals employed by the W-2 Agency's subcontractors.

BWF developed a spreadsheet to assist W-2 Agencies in capturing training completion, including training that has been taken as a result of an approved training equivalency or waiver. W-2 Agencies must have all training information entered into the spreadsheet and submitted by the second Friday in January of each calendar year for the prior calendar year.

W-2 Agencies should send the completed spreadsheet to David Turk, PTT Training Coordinator/Liaison (david.turk@wisconsin.gov) by the deadline above. If W-2 Agencies have questions about the spreadsheet, they should contact David at 414-315-5403.

PTT will continue to maintain training records for those who attend DCF sponsored training programs.

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