

APPENDIX B-1
INFORMATION MAP FOR 2008 W-2 CONTRACT PERIOD
Wisconsin Works (W-2) and Related Programs Contract
For the period January 1, 2008 through December 31, 2008

PERFORMANCE STANDARDS FOR THE 2006-2009 W-2 AND RELATED PROGRAMS CONTRACT

The Performance Standards have been established to measure appropriate and quality services being provided to W-2 participants.

This chart shows the required Performance Standards for:

1. Annual Compliance; and
2. Right of First Selection (RFS) for the next W-2 Contract (Contract Period beginning January 1, 2010).

Performance Standards will be measured for the period of January 1, 2006, through December 31, 2009. Right of First Selection will be measured yearly for the period January 1, 2006, through December 31, 2008. This information map includes measurement criteria for the period of time from January 1, 2008 through December 31, 2008. Performance Standards are measured Year-to-Date, Point-in-Time or During-the-Month. Year-to-Date is cumulative beginning in January and ending at the end of the calendar year. Point-in-Time is measured on the last working day of each calendar month and an average for all months in a calendar year will be calculated to determine if the criteria have been met. During-the-Month is measured when the activity has been completed and documented within 30 calendar days of the W-2 placement for the assessment standard and 90 calendar days from the successful completion of a Job Skills activity.

Right of First Selection will be earned when an agency meets all standards for a minimum of 2 out of 3 years for the calendar years 2006, 2007 and 2008.

Note: RFS may be revoked for uncorrected non-performance, in accordance with Contract sections 17.2 and 17.3.

W-2 Contract Agency Category

W-2 Contract Agencies are assigned to one of five categories based on their location, size and function. 2008 Benchmarks are identified for each standard based on the type of agency. Agency types include:

1. Small Agencies are agencies that are outside of Milwaukee County and not listed as a Large Agency.
2. Large Agencies have an average monthly caseload greater than 50 (caseload data from 9/2006 – 8/2007) and are located outside of Milwaukee County. The following agencies have been identified as large
 - a. Kenosha
 - b. Rock
 - c. Racine
 - d. Capitol Consortium
 - e. Marathon
 - f. Arbor
 - g. PAW Consortium
3. Case Management Agencies (CMA) are agencies within Milwaukee County that have been designated to provide CMA services.
4. Job Development and Placement Agencies (JDPA) are agencies within Milwaukee County that have been designated to provide JDPA services.
5. SSI/SSDI Agency is located within Milwaukee County and has been designated to provide services to individuals applying for SSI/SSDI benefits.

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Case Credit

In order to recognize that for some agencies, especially those with small caseloads, a caseload credit can make a significant difference in the calculation of the Performance Standards Benchmarks, a Case Credit is established. If the case credit results in the agency meeting a performance standard, the calculation result will default to the benchmark for the standard.

The Five Case Credit applies to agencies when:

- a) The W-2 Contract Agency does not meet the Benchmark for one or more of the required standards.
- b) The W-2 Contract Agency is located outside of Milwaukee County.

The Department makes the final determination of whether a W-2 Contract Agency meets the Benchmark for a Performance Standard.

Zero Case Credit

The Department will apply a Zero Case Credit to any W-2 Contract Agency with no cases in a Performance Standard calculation. The Zero Case Credit, when applied, will result in the W-2 Contract Agency meeting the Annual Benchmark.

Worker Error Adjustment

The Worker Error Adjustment process outlined in the Bureau of Wisconsin Works (BW-2) Operations Memo 04-48, which was developed to address unusual or non-recurring events, will remain in effect for the 2006-2009 Contract Period. To request consideration, a W-2 agency must submit a written request in accordance with the Department's policies and procedures.

Risk Protection Adjustment

The Risk Protection Adjustment is designed to allow unique circumstances related to the unemployment rate of each county to be considered by the Department. This adjustment can not be applied to a tribal agency. The agency must request the Department apply the Risk Protection Adjustment prior to January 31 of the year immediately following the year for which the adjustment is requested. *Example: Request for January 1, 2008 – December 31, 2008 must be received by January 31, 2009.* The Department will apply this adjustment as follows:

- 1) The Department will establish a baseline for each county or consortium based on that county's average weekly continuous unemployment insurance (UI) benefits claims for calendar years 1999 through 2001.
- 2) A county's continuous UI claims level for subsequent periods will be "indexed" in relationship to that baseline. That is, the baseline will be defined as 1.00 and subsequent years will be calculated as a multiple of that 1.00 baseline. *For example, unemployment levels 25% greater higher than the 1999-2001 average would have an indexed value of 1.25, while unemployment levels 10% lower than the 1999-2001 average would have an indexed value of 0.9.*
- 3) Any county for which the indexed weekly continuous UI claims for calendar years 2006, 2007, 2008 average out to greater than 1.5 will be eligible for the Risk Protection Adjustment.
- 4) For each tenth of a point by which the indexed average weekly continuous unemployment claims for that county for calendar years 2006, 2007, 2008 exceeds 1.5, the Entered Employment performance standard benchmark will be lowered by one percent. *For example, if a county's indexed 2006 unemployment claims were to equal 2.5, and to earn RFS the required Entered Employment rate was 45% then the Entered Employment benchmark would be lowered by 10% of 45% (or 4.5%), to 40.5%.*

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<p>Entered Employment Placement Rate <i>Year-to-Date</i></p>	<p>The percentage of the total W-2 participants served by the agency, with the exception of W-2 T participants, for which an eligible Entered Employment (EE) placement is recorded on WPEH in the Client Assistance for Reemployment and Economic Support (CARES) system.</p> <p>Performance will be measured by counting all W-2 participants expected to work 30 days or more who, after referral to work programs,:</p> <ol style="list-style-type: none"> 1. are unemployed and obtain unsubsidized employment that is expected to last 30 days or longer; or 2. are employed in unsubsidized employment and obtain new employment that is expected to last 30 days or longer with higher gross wages. 	<p><u>Numerator =</u></p> <ul style="list-style-type: none"> • Entered Employment field on WPEH = Y • Entered Employment with Duration on WPEH as Full-Time > = 30 days, or Part-Time > = 30 days • Begin Date of Entered Employment must be between 1/1/2008 and 12/31/2008 • Not deleted Entered Employment <p>Entered Employments will only be counted in the performance standard when entered into CARES up to 90 days after the effective date of the employment.</p> <p><u>Denominator =</u> W-2 applicants/participants except:</p> <ul style="list-style-type: none"> • All W-2 cases referred, transferred for which W-2 begins or is ongoing within the contract period and subsequently disenrolled, or transferred out (by 1/31/09) with: <ol style="list-style-type: none"> a. no intervening activities or only Upfront activities assigned; or b. only assigned to W-2 T placement unless the individual obtained employment. 	<p><u>Benchmarks</u></p> <p>Small Agencies – 35%</p> <p>Large Agencies – 35%</p> <p>CMA Agencies – 40%</p> <p>JDPA Agencies – 55%</p> <p>SSI Agency – Does Not Apply</p>

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<p>Retention/Stabilization in the Workforce <i>Year-to-Date</i></p>	<p>The percentage of the total W-2 participants from the numerator of the EE Placement Rate performance standard for whom total UI wages for the two (2) quarters following the quarter of employment are equal to or greater than the target amount. Only EE's starting in calendar year 2007 will be counted in the 2008 measure.¹</p> <p>Full-Time: Measures retention for EE's with 30 or more hours per week.</p> <p>Part-Time: Measures retention for EE's with less than 30 hours per week.</p>	<p>All participants with an EE will be counted in the denominator once.</p> <p>*For multiple EE's, the retention that favors the agency will be counted in the numerator.</p> <p><u>Reports:</u> 1st report will be available 5/2008 and every 3 months following that.</p> <p>Preliminary report will be available 2/2008.</p>	<p><u>Numerator =</u> All unduplicated W-2 participants who meet or exceed the target amount calculated by adding the 2 quarters of UI wage data after an EE.</p> <p><u>Denominator =</u> All unduplicated W-2 participants who are listed in the numerator of the EE performance standard.</p> <p>Full-Time: \$6,760 for all full-time employment with a begin date between January 1, 2007 and December 31, 2007.</p> <p>Part-Time: \$3,380 for all part-time employment with a begin date between January 1, 2007 and December 31, 2007.</p> <p><u>Benchmarks:</u></p> <p>Small Agencies Full-Time – 35% Part-Time – 25%</p> <p>Large Agencies Full-Time – 35% Part-Time – 25%</p> <p>CMA Agencies Full-Time – 35% Part-Time – 25%</p> <p>JDPA Agencies Full-Time – 50% Part-Time – 30%</p> <p>SSI Agency – Does Not Apply</p>

¹ Due to the time lag of UI data, 2008 EE's will have retention measured in 2009.
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<p>Wage At Employment <i>Year-to-Date</i></p>	<p>The total Entered Employments from the numerator of the EE Placement Rate performance standard for whom starting wages were equal to or greater than the targeted outcome for that geographic area or consortium.</p> <p>Targeted outcomes will be calculated using average entered employment wages of W-2 participants for each Contract Agency.</p>	<p>All W-2 EE's with hourly wages (indicated with the pay code of HR on WPEH) will be included in the calculation to determine the average wage for that contract agency.</p> <p>Note: The data for this standard will come from the numerator from each agencies Entered Employment report.</p> <p>Remove all wages less than the State's hourly minimum wage (currently \$6.50).</p>	<p>The target outcome is based on 2006 performance per contract agency's entered employment average wage.</p> <p>The benchmark is pass or fail based on the collective contract agency average.</p> <p><u>Benchmarks</u></p> <p>Benchmarks will be set for each individual contract agency based on 2006 Entered Employment Wages for past W-2 performance. See last page of Appendix B-1 for average wages for each contract agency.</p> <p>Small Agencies – Applies Large Agencies – Applies CMA Agencies – Does Not Apply JDPA Agencies – Applies SSI Agency – Does Not Apply</p>

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<p>Success of Job Skills Training <i>During-the-Month</i></p>	<p>Success of Job Skills Training will be measured by the percentage of participants who successfully complete a Job Skills (JS) Training activity and record an Entered Employment during the training or within 90 days of completion of the Job Skills Training activity.</p> <p>All unduplicated W-2 participants who successfully complete a Job Skills Training will be included in the denominator.</p>	<p>Unduplicated participants are selected based on JS being assigned and successfully completed on WPCH with a completion code of A (successfully completed) or N (employed).</p> <p>Note: The JDPA agency that assists the participant to successfully complete the Job Skills Training activity will be the agency that receives credit for any Entered Employment even if the participant relocates to another W-2 region.</p> <p><u>Reports</u>: First required report will be available July 2008.</p> <p>Preliminary reports will be available March 2008.</p>	<p><u>Numerator =</u> Unduplicated W-2 participants who successfully complete JS and have an EE during the JS training or within 90 days of completion of JS.</p> <p>Note: Agency has 90 days from the begin date of the Entered Employment to enter it into CARES.</p> <p><u>Denominator =</u> All unduplicated W-2 participants who successfully complete JS.</p> <p><u>Benchmarks</u></p> <p>Small Agencies – 75%</p> <p>Large Agencies – 75%</p> <p>CMA Agencies – Does Not Apply</p> <p>JDPA Agencies – 75%</p> <p>SSI Agency – Does Not Apply</p>

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<p>SSI/SSDI Receipt <i>Year-to-Date</i></p>	<p>The percentage of the total W-2 participants receiving SSI/SSDI Advocacy Services as recorded in CARES for whom SSI/SSDI is awarded within 12 months..</p> <p>All BOS W-2 participants who were placed in SSI/SSDI Advocacy (SD in CARES) 12 months ago. All Milwaukee participants who began receiving services through the SSI Advocacy Agency in Milwaukee 12 months ago will be included in the denominator.</p> <p>Use CARES Worker Web (CWW) Screen, Benefits Received for data validation for all participants in the BOS that are in SD activity and participants in Milwaukee assigned to the SSI Advocacy Agency.</p>	<p>Calculated only for W-2 participants who were assigned to SD in the BOS and/or to SSI Advocacy Agency in Milwaukee 12 months prior to the month being measured.</p> <p>The SSI denominator will be created with the assignment of the SD activity in the BOS and the SSI Advocacy Agency in Milwaukee.</p> <p>Participants are selected for the numerator from CWW Benefits Received, where SSI is reported as being awarded during W-2 or within 60 days of W-2 ending.</p> <p><u>Exclusions:</u> Participants will be eliminated if the CARES case is closed and ANBR has an indicator of 'N' at the 12 month measurement.</p> <p><u>Note for Milwaukee:</u> Participants will be removed from the denominator if transferred out with no intervening activities assigned while in office 1700.</p> <p><u>Reports:</u> Detail reports will have an indicator if case has received SSI. A performance standard final report will be generated after the SD or 1700 office assignment has reached 12 months. The final report will not count participants prior to the 12 month measurement period.</p>	<p><u>Numerator =</u> Total number of W-2 participants who began SD on WPCH in 2007 or assigned to the SSI Advocacy Agency (office 1700) in Milwaukee in 2007, and are awarded SSI/SSDI (as documented through the data exchange on CWW Benefits Received) within 12 months of activity or work program office begin date as indicated in CARES.</p> <p><u>Denominator =</u> Total number of all W-2 participants placed 12 months before the measured month in SSI/SSDI Advocacy (SD) in the balance of the state during calendar year 2007 and all participants who begin receiving services through the SSI Advocacy Agency in Milwaukee during calendar year 2007 (who are not otherwise excluded).</p> <p><u>Benchmarks</u></p> <p>Small Agencies – 30%</p> <p>Large Agencies – 30%</p> <p>CMA Agencies – Does Not Apply</p> <p>JDPA Agencies – Does Not Apply</p> <p>SSI Agency – 35%</p>

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<p>Basic Education Activities <i>Point-in-Time</i></p>	<p>Adult W-2 participants who do not have a high school diploma or its equivalency as indicated on CARES Worker Web screen, School Enrollment and are receiving basic educational services. Basic education activities include Basic Education (BE), English as a Second Language (EL), GED (GE), High School Equivalency (HE), Literacy Skills (LS), and Regular High School (RS), Vocational Basic Education (VA), Vocational English as a Second Language (VE), Vocational Literacy Skills (VL).</p>	<p>Participants are selected from WPWW, where there is an open W-2 placement type of W-2 T, CSJ, CS1, CS2, CS3 or TJB, and no W-2 end date. Only participants who do not have a high school diploma or equivalency as designated on ANSE are selected.</p> <p>This standard does not apply to W-2 case management, CMC participants, or W-2 participants who are assigned to SSI/SSDI advocacy (SD) services on WPCH on the last day of the month.</p>	<p><u>Numerator =</u> All selected W-2 participants with less than a high school education who have an open BE, EL, GE, HE, LS, RS, VA, VE, VL activity (with a valid activity begin date) as of the last day of the report month.</p> <p><u>Denominator =</u> Total selected W-2 participants with less than a high school education in a W-2 subsidized placement (W-2 T, CSJ, CS1, CS2, CS3, or TJB) as of the last day of the report month.</p> <p><u>Benchmarks</u></p> <p>Small Agencies – 65%</p> <p>Large Agencies – 65%</p> <p>CMA Agencies – 65%</p> <p>JDPA Agencies – Does Not Apply</p> <p>SSI Agency – 65%</p>

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INDICATOR	DEFINITION	SELECTION CRITERIA & EXCLUSIONS	BENCHMARK
<p>Assessment <i>During-the-Month</i></p>	<p>Assessment services refer to the set of evaluations that each W-2 participant who is placed in a subsidized or unsubsidized employment position (with the exception of CMC cases) receives.</p> <p>A. For W-2 Placements: Participants who are placed in any subsidized or unsubsidized W-2 placement (with the exception of CMC cases), either initially or as movement from one placement to another, must have an informal assessment completed and documented on WPED within 30 calendar days before or after the date that W-2 placement begins.</p> <p>B. For W-2 Transition: Participants who are placed in a W-2 T must have a formal assessment initiated or completed and documented in CARES within 30 calendar days before or after beginning a W-2 T. This formal assessment must be completed by a medical or mental health/Alcohol and Other Drug Abuse (AODA) health professional, Division of Vocational Rehabilitation (DVR) counselor or similarly qualified assessing agency or business.</p> <p>Both A and B must be met.</p>	<ol style="list-style-type: none"> 1. The formal assessment codes are AODA Assessment (AA), Domestic Violence Assessment (AV), Disability Assessment (AD), Physician Assessment (AL), Mental Health Assessment (AM), as found on WPCH. The Caring for Disabled Child (CD) will also be allowed to meet this standard. 2. Participants with the same consecutive W-2 placements i.e., W-2 T placement ends on 6/30/05 and new W-2 T placement begins on 7/1/05, will be excluded. 3. Participants who are referred or enrolled in W-2 contract agency for less than 30 days will be removed from the denominator. <p><u>Note:</u> Informal Assessment completion is tracked by answering the assessment question on WPED and completing the entire CARES Assessment Driver Flow, which begins with WPED and ends with WPRU.</p>	<p>A. For W-2 Placements: <u>Numerator =</u> Total number of W-2 placements for which an informal assessment was completed and documented within 30 calendar days of the placement begin date.</p> <p><u>Denominator =</u> Total number of W-2 placements beginning during contract period for all W-2 participants.</p> <p>B. For W-2 Transition: <u>Numerator =</u> Total number of W-2 T placements for which a formal assessment was initiated or completed with a successful completion code of A (successfully complete) or P (completed appropriate formal assessment within the prior 12 months) and documented within 30 calendar days.</p> <p><u>Denominator =</u> Total number of W-2 T placements beginning during contract period for all W-2 participants.</p> <p>Both calculation results must meet respective base rates to meet the performance standard.</p> <p><u>Benchmarks for both W-2 Placements (A) and W-2 Transition (B)</u></p> <p>Small Agencies – 95% Large Agencies – 95% CMA Agencies – 95% JDPA Agencies – Does Not Apply SSI Agency – 95%</p>

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<p>Quality of Case Management/ Customer Satisfaction Survey <i>Year-to-Date</i></p>	<p>Quality Case Management/Customer Satisfaction refers to the delivery of services by the W-2 Contract Agencies with the aim of satisfying its customers. Quality Case Management/Customer Satisfaction will be measured monthly through a survey of W-2 participants who have received services for a minimum of 60 days from the W-2 Contract Agency.</p> <p>Each agency must achieve a minimum average score of 7.5 or greater on a 10-Point scale for each question.</p> <p>This will be measured by two different categories of questions.</p> <p>1. Questions will be focused on services provided to participants that are reported on CARES. (i.e. quality of work experience site, relevance of work experience site to the employment goal, etc.).</p> <p>2. Overall satisfaction and staff availability questions will be asked of all surveyed participants. (i.e., returned phone calls within 2 days, overall satisfaction of services received, etc.).</p>	<p>Included in the measure are:</p> <ol style="list-style-type: none"> 1. All W-2 Contract Agencies. 2. Work program Contract Individuals (WCI) active at the end of the month or closed during the month that have at least 60 consecutive days enrolled in the same Work Program Office, or WCI's closed during the month with at least 60 days of service in the same Work Program Office. <p>A sample of participants will be surveyed monthly in each agency.</p>	<p>Manual calculation will be performed by Department.</p> <p>For each question measured: <u>Numerator =</u> Total scores for all survey responses.</p> <p><u>Denominator =</u> Total number of survey responses.</p> <p><u>Benchmarks for Each Question</u></p> <p>Small Agencies – 7.5</p> <p>Large Agencies – 7.5</p> <p>CMA Agencies – 7.5</p> <p>JDPA Agencies – 7.5</p> <p>SSI Agency – 7.5</p>

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W-2 AGENCY	W-2 Average Wage*
BAYFIELD	\$6.50
BURNETT	\$6.50
CLARK	\$6.50
WCI - COLUMBIA	\$9.13
CRAWFORD	\$6.50
DOOR	\$7.69
WCI - DOUGLAS	\$7.92
DUNN	\$9.04
EAU CLAIRE	\$8.55
FOND DU LAC	\$8.00
GREEN LAKE	\$6.50
IRON	\$6.50
JEFFERSON	\$6.50
KAISER-WALWORTH	\$8.25
KENOSHA	\$8.09
LA CROSSE	\$7.82
MARATHON	\$8.22
MARINETTE	\$6.50
OCONTO	\$6.50
PEPIN	\$6.50
POLK	\$8.15
RACINE	\$8.16
ROCK	\$7.54
RUSK	\$6.50
SHAWANO	\$7.45
TAYLOR	\$6.50
VERNON	\$6.50

W-2 AGENCY	W-2 Average Wage*
WINNEBAGO	\$7.64
SW CONSORTIUM	\$7.81
FSC – WAUSHARA	\$7.00
FSC – NORTHERN CONSORTIUM	\$7.45
CAPITAL CONSORTIUM	\$8.90
PAW CONSORTIUM	\$7.63
FSC - BAY AREA CONSORTIUM	\$8.04
ARBOR – WAUK/OZAU/WASH CONSORT	\$8.41
ASHLAND/PRICE CONSORTIUM	\$7.04
SAWYER/WASHBURN CONSOR.	\$6.50
MILWAUKEE	\$8.24
LAKESHORE CONSORTIUM	\$7.57
WCI – PIERCE/ST. CROIX	\$9.66
WRI – BARRON/CHIPPEWA	\$8.14
WAUPACA	\$6.93
WCI –JACK/JUN/MONROE/TREMP/BUFF.	\$7.58
OUTAGAMIE/CALUMET CONSORT	\$8.30

***NOTE: Average Hourly Wage was calculated from EE's reported in 2006 for W-2 participants who were paid at least the state minimum hourly wage. The highest wage is removed from the calculation.**

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Acronyms:

BOS = Balance of State W-2 Contract Agencies
CMA = Case Management Agency in Milwaukee
JDPA = Job Development Placement Agency in Milwaukee

SSI = Supplemental Security Income
SSDI = Social Security Disability Income

EE = Entered Employment
UI = Unemployment Insurance

TJB = W-2 Trial Job placement
CSJ = W-2 Community Service Job placement
CS1 = 1/3 CSJ placement
CS2 = 1/2 CSJ placement
CS3 = 2/3 CSJ placement
W-2 T = W-2 Transition placement
CMC = Caretaker of a Newborn placement

CARES Screens

WPEH = Work Programs Employment History
WPCH = Work Programs Component History
WPED = Work Programs Educational Detail
WPWW = Work Programs Placement Screen

Definitions:

WCI = Work Program Contract Individuals are individuals who are open (Referred, Scheduled or Enrolled) in W-2 for at least one day during the contract period, excluding those who are only in Children First, and those with a CARES Registration Code of "L" (Learnfare).

Contract Agency = W-2 Contract Agency as a single county, or single region, or a consortium with more than one county or region.

Benchmark = Annual Compliance and Right of First Selection benchmark.