

APPENDIX B
INFORMATION MAP FOR 2006-2009 W-2 CONTRACT
Wisconsin Works (W-2) and Related Programs Contract
For the period January 1, 2006 through December 31, 2009

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 and FSET 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).

Information will be measured for the period of January 1, 2006, through December 31, 2009. Right of First Selection will be measured for the period January 1, 2006, through December 31, 2008. Performance Standards are measured Contract-to-Date, Point-in-Time or During-the-Month. Contract-to-Date is cumulative beginning January 1, 2006, through the last working day of the report month. Point-in-Time is measured on the last working day of each calendar month and an average for all months 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 60 calendar days from the successful completion of a Job Skills activity.

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

One Case Credit

In order to recognize that for some agencies, especially those with small caseloads, one case can make a significant difference in the calculation of the Performance Standards Benchmarks, a One Case Credit is established.

A One Case Credit will apply when:

- a) The Department makes the final determination of whether a W-2 Contract Agency meets the Benchmark for a Performance Standard;
- b) The W-2 Contract Agency does not meet the Benchmark for one or more of the following standards: Entered Employment Placement Rate, Success in the Workforce/Retention, Wage at Employment, SSI/SSDI Receipt, Assessment, Basic Education Activities, Success of Job Skills Training, Quality of Case Management/Customer Satisfaction; and
- c) At least one of the W-2 Contract Agency's cases does not meet one or more of the Benchmarks for the Performance Standards.

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Zero Case Credit

The Department will apply a special Zero Case Credit to any W-2 Contract Agency with no cases for a Performance Standard (if there are any W-2 agencies with zero cases at the time of the Department's Performance Standards calculations). The Zero Case Credit will result in any W-2 Contract Agency with no cases meeting the Annual Compliance Benchmark and RFS 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

At the request of a W-2 Contract Agency that is not a tribal agency the Department will reassess the Performance Standards Benchmark. The Risk Protection Adjustment is designed to allow unique circumstances related to the unemployment rate of each county to be considered by the Department. The agency must request the Department apply the Risk Protection Adjustment prior to January 31 of the year immediately following the prior year. *Example: Request for January 1, 2006 – December 31, 2006 must be received by January 31, 2007.* 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% 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 (Contract-to-Date)</p>	<p>For W-2 and FSET Individuals: The percentage of the total individuals served by the agency with the exception of SSI tracked individuals 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 individuals expected to work 30 days or more in FSET or W-2 who meet the following Entered Employment definition:</p> <ol style="list-style-type: none"> 1. an individual who is unemployed and obtains unsubsidized employment that is expected to last 30 days or longer after referral to work programs or; 2. an individual who is employed in unsubsidized employment and obtains new employment that is expected to last 30 days or longer with higher gross wages after referral to work programs. 	<p>Numerator:</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 1/1/2006 and 12/31/2009 • Not deleted Entered Employment <p>Denominator: W-2 and FSET applicants/participants except:</p> <ul style="list-style-type: none"> • All W-2 or FSET cases referred, transferred, W-2 begins or ongoing within the contract period and subsequently disenrolled, or transferred out (by 1/31 of the following year for December report month) with: <ol style="list-style-type: none"> a) no intervening activities or only Upfront activities assigned; b) SSI tracked individuals with the SD activity code (BOS) or assigned to the SSI Advocacy Agency (Milwaukee) with the exception of individuals who obtain employment or are subsequently referred again to Work Programs; c) FSET cases that close due to FSET individual receiving SSI/SSDI d) only enrollment or enrollment/ orientation; or e) have one or more of the following FSET only transactions: Sanction Requested Sanction Pending Exemption Requested 	<p><u>Numerator =</u> Total Number of Full-time and Part-time Entered Employments</p> <p><u>Denominator =</u> Total Work Contract Individuals Served</p> <p>The contract benchmark is: BOS & CMA Agencies As of 12/31/06 – 35% As of 12/31/07 – 40% As of 12/31/08 - 45%</p> <p>JDPA Agencies As of 12/31/06 – 45% As of 12/31/07 – 50% As of 12/31/08 – 55%</p> <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>CMA – Y JDPA – Y SSI – N BOS – Y</p>

¹ Removing individuals from the EE denominator where the only activities assigned were upfront activities.

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<p>Retention/Stabilization in the Workforce. (Contract-to-Date)</p>	<p>For W-2 and FSET Participants: The percentage of the total 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.</p>	<p>JDPA and BOS Agencies: All participants with an EE will be counted in the denominator once.</p> <p>CMA Agencies: The denominator from the corresponding JDPA (EE's) will be the same denominator for the CMA Agency</p> <p>For multiple EE's the retention that favors the agency will be counted in the numerator.</p> <p>Note: 1st report will be available 2/2007 and every 3 months following that.</p> <p>Preliminary report will be available 2/2007.</p>	<p><u>Numerator =</u> All unduplicated 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 participants who are listed in the numerator of the EE performance standard.</p> <p>The benchmark target amount is:</p> <p>The target amount is \$5,928 for all employment with a begin date between October 1, 2005 and December 31, 2006.</p> <p>The target amount is \$6,760 for all employment with a begin date greater than or equal to January 1, 2007</p> <p>The contract benchmark is 50%.</p>	<p>CMA – Y JDPA – Y SSI – N BOS – Y</p>

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Wage At Employment (Contract-to-Date)	<p>For W-2 and FSET Individuals: The total individuals 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 and FSET individuals for each Contract Agency.</p>	<p>All individuals who have an EE 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 \$5.70 and will be \$6.50 as of 6/1/06)</p> <p>Note: Random sampling using State New Hire Data will be done.</p>	<p>Past level of performance per contract agency's entered employment average wage.</p> <p>Benchmark will be set for each individual contract agency based on 2004 Entered Employment Wages for past W-2/FSET performance. See last page for average wages for each contract agency.</p> <p>The benchmark is pass or fail based on the collective contract agency average.</p>	CMA – N JDPA – Y SSI – N BOS - Y

² Milwaukee County Average Wage was calculated inaccurately in the prior information map and has been corrected.

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<p>Success of Job Skills Training (During-the-Month)</p>	<p>For W-2 Participants: 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 60 days of completion of the Job Skills Training activity.</p> <p>All unduplicated W-2 participants who successfully complete a JS 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 who 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 participants relocates to another W-2 service area.</p>	<p><u>Numerator =</u> Unduplicated W-2 participants who successfully complete JS and have an EE during the JS training or within 60 days of completion of JS</p> <p>Note: Agency has 90 days from the begin date of the Entered Employment to enter into CARES.</p> <p><u>Denominator =</u> All unduplicated W-2 participants who successfully complete JS.</p> <p>The contract benchmark is 75%.</p> <p>First Required report will be available July 2006.</p> <p>First Detailed report will be available March 2006.</p>	<p>CMA – N JDPa – Y SSI – N BOS - Y</p>

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<p>SSI/SSDI Receipt (Contract-to-Date)</p>	<p>For W-2 Participants: The percentage of the total participants receiving SSI/SSDI Advocacy Services as recorded in CARES for whom SSI/SSDI is awarded.</p> <p>All W-2 participants placed in SSI/SSDI Advocacy (SD activity in CARES) in the balance of the state (BOS) and all participants receiving services through the SSI Advocacy Agency in Milwaukee will be included in the denominator.</p> <p>Use ANBR* 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 are assigned to SD in the BOS and to the SSI Advocacy Agency in Milwaukee.</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 ANBR*, where SSI is reported as being awarded during W-2 or within 60 days of W-2 ending.</p> <p>Individuals will be eliminated if ANBR* has an indicator of N at the 12 and/or 24 month measurement and the CARES case has been closed.</p> <p>NOTE BOS – Adjustments will be accepted through 4/30/06 for participants placed in SD prior to 1/1/06 and reevaluated by 3/31/06 where a determination is made that SD is not appropriate. NOTE Milwaukee – Individuals will be removed from the denominator if transferred out with no intervening activities have been assigned while in office 1700.</p> <p>First reports will be detailed reports with indicator if case has received SSI, once the 12 months has passed a report with the agency's percentage will be generated. A similar report will be generated for the 24 month benchmark.</p>	<p><u>Numerator =</u> Total number of W-2 participants in SD or in Milwaukee assigned to the SSI Advocacy Agency that are awarded SSI/SSDI (as documented through the data exchange on ANBR*) within 12 months (benchmark A) or within 24 months (benchmark B) 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 in SSI/SSDI Advocacy (SD) in the balance of the state and all participants receiving services through the SSI Advocacy Agency in Milw.</p> <p>Benchmark for A: 30% of all cases in BOS that are assigned to SD or in Milwaukee that are assigned to the SSI Advocacy Agency are approved for SSI up to 12 months from the assignment.</p> <p>Benchmark for B: 45% of all cases in BOS that are assigned to SD or in Milwaukee are assigned to the SSI Advocacy Agency are approved for SSI up to 24 months from the assignment.</p>	<p>CMA – N JDPA – N SSI – Y BOS - Y</p>

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<p>Basic Education Activities (Point-in-Time)</p>	<p>For W-2 Participants: Adult W-2 participants who do not have a high school diploma or its equivalency as indicated on ANSE*. 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 ACWI*, where there is an open W-2 placement type of W-2T, 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 FSET participants.</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-2T, CSJ, CS1, CS2, CS3, or TJB) as of the last day of the report month.</p> <p>The contract benchmark level is 65% or more.</p>	<p>CMA – Y JDPA – N SSI – Y BOS - Y</p>

³ Added the new vocational educational activity codes – VA, VE, and VL.
11/20/2006

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INDICATOR	DEFINITION	SELECTION CRITERIA & EXCLUSIONS	BENCHMARK	APPLICABLE
<p>Assessment (During-the-Month)</p>	<p>For W-2 Participants: 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: 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-2T Cases only: Participants who are placed in a W-2T must have a formal assessment initiated or completed and documented in CARES within 30 calendar days before or after beginning a W-2T. This formal assessment must be 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. Calculated only for W-2 participants. 2. 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. 3. Individuals with the same consecutive W-2 placements i.e., W-2T placement ends on 6/30/05 and new W-2T placement begins on 7/1/05, will be excluded. 4. Individuals who are referred or enrolled in W-2 contract agency for less than 30 days will be removed from the denominator. <p>Note: 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. <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-2T 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. <u>Denominator</u> = Total number of W-2T placements beginning during contract period for all W-2 participants. Both calculation results must meet respective base rates to meet the performance standard.</p> <p><u>For W-2 Placements:</u> (A) Contract benchmark is at least 95%. <u>For W-2 Transition:</u> (B) Contract benchmark is at least 95%.</p>	<p>CMA – Y JDPA – N SSI – Y BOS - Y</p>

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<p>Quality of Case Management/ Customer Satisfaction Survey (Contract-to-Date)</p>	<p>For W-2 and FSET Participants:</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 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.</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. (e.g., returned phone calls within 2 days, overall satisfaction of services received, etc.)</p>	<p>1. All W-2 Contract Agencies.</p> <p>2. Work program Contract Individuals (WCI) active at the end of the month and have at least 60 consecutive days in the same Contract Agency, or, WCI's closed during the quarter with at least 60 days of service.</p> <p>3. Milwaukee CMA Agencies will exclude FSET cases from the survey. FSET cases in Milwaukee will be surveyed as part of the JDPa survey.</p> <p>A set number of participants will be surveyed in each agency. The number will not be determined until the contract areas are determined.</p>	<p>Manual calculation will be performed by DWS.</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>The benchmark for each question is equal to or greater than 7.5.</p>	<p>CMA – Y JDPa – Y SSI – Y BOS - Y</p>

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W-2 AGENCY	W-2 & FSET Average Wage*
BAYFIELD	\$7.87
BUFFALO	\$7.00
BURNETT	\$7.74
CLARK	\$7.61
WCI - COLUMBIA	\$8.62
CRAWFORD	\$7.29
DOOR	\$8.25
(WCI) DOUGLAS	\$7.62
DUNN	\$8.93
EAU CLAIRE	\$7.75
FOND DU LAC	\$7.82
GREEN LAKE	\$7.89
IRON	\$6.66
JEFFERSON	\$8.46
KENOSHA	\$7.75
LA CROSSE	\$7.58
MARATHON	\$7.85
MARINETTE	\$8.39
OCONTO	\$7.78
PEPIN	\$7.94
POLK	\$9.24
RACINE	\$7.62
ROCK	\$8.02
RUSK	\$7.65
SHAWNO	\$7.74
TAYLOR	\$8.86
VERNON	\$7.78
KAISER-WALWORTH	\$8.15
WAUPACA	\$7.84

W-2 AGENCY	W-2 & FSET Average Wage*
WINNEBAGO	\$7.95
SW CONSORTIUM	\$8.05
FSC – WAUSHARA	\$7.74
FSC – NORTHERN CONSORTIUM	\$7.91
CAPITAL CONSORTIUM	\$8.70
PAW CONSORTIUM	\$7.53
BAY AREA CONSORTIUM	\$7.89
ACS – WAUK/OZAU/WASH CONSORT	\$9.41
ASHLAND/PRICE CONSORTIUM	\$7.68
SAWYER/WASHBURN CONSOR.	\$7.66
MILWAUKEE	\$8.05
LAKESHORE CONSORTIUM	\$8.39
WCI – PIERCE	\$9.66
**WRI – BARRON/CHIPPEWA	\$7.99
WCI –JACK/JUN/MONROE/TREMP.	\$8.15
OUTAGAMIE/CALUMET CONSORT	\$8.23
** WRI = WORKFORCE RESOURCES INC.	
NOTE:* Average Hourly Wage was calculated from EE's reported in 2004 for W-2 and FSET participants that were at least the state minimum hourly wage and one high wage was removed.	

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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-2T = W-2 Transition placement
CMC = Caretaker of a Newborn placement

FSET = FoodShare Employment and Training

CARES Screens
WPEH = Work Programs Employment History
WPCH = Work Programs Component History
WPED = Work Programs Educational Detail

Notes:

* With the implementation of CARES Worker Web (CWW) data will be extracted from the CARES equivalent screen in CWW.

Definitions:

WCI = Work Program Contract Individuals are individuals who are open (Referred, Scheduled or Enrolled) in W-2 or FSET 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 with more than one county or region in the consortium configuration.

Benchmark = Annual Compliance and Right of First Selection benchmark.