

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

ACTION
 NOTICE **12-12**

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*PROGRAM CATEGORIES:

AS FM ML TR
 CC FL NA W-2
 CS IT RA WIA
 CF JC TC
 CR LM TA

TO: W-2 Agency Directors

FROM: Kris Randal
 Division Administrator

RE: **Required Training for Wisconsin Works and Related Workers**

PURPOSE:

In order to administer the Wisconsin Works (W-2) program, W-2 workers must be trained in policy, reporting systems and case management skills. These skills enable them to effectively connect low-income job seekers to work while providing adequate assessment and equitable service. This Memo outlines W-2 workers training requirements.

The Department of Children and Families (DCF), Division of Family and Economic Security (DFES) requires training for W-2 workers by Administrative Rule DCF 103 (November, 2008) and based on operational needs. This Administrator's Memo outlines both the initial and ongoing training requirements for W-2 workers.

BACKGROUND:

Administrative Rule DCF 103 (November, 2008) outlines the training requirements for W-2 Contractor Financial and Employment Planners (FEPs), Resource Specialists (RS), Case Managers and Supervisors. The rule states that Case Managers who perform any FEP function are required to complete the appropriate training as specified by the Bureau of Working Families (BWF) Partner Training Section (PTS), regardless of job title used by the local W-2 agency. This includes Case Managers who specialize in employment attachment and retention, assist 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.

The rule specifies that W-2 Contractors that subcontract out a portion of their obligations under the W-2 and Related Programs Contract with the Department are responsible for ensuring that the subcontractors comply with the Bureau's training requirements. The W-2 agencies are also responsible for including subcontractors in the annual report submitted to the Bureau on training completed by all workers.

The training requirements stated in this Administrator's memo reflect those stated in Administrative Rule DCF 103, as well as DCF expectations for training of W-2 staff.

Definitions of agency functions:

- A Financial and Employment Planner (FEP) is a Case Manager employed by a W-2 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, provides service to W-2 participants with special needs, or assists W-2 participants with the SSI and SSDI application process.
- Case management is the family centered and goal oriented process for assessing the needs of a W-2 group member and his or her family for employment, training, and supportive services, and assisting the W-2 group member in obtaining services to achieve self-sufficiency.
- A Resource Specialist (RS) is a worker employed by a W-2 agency, directly or by subcontract, who performs any part of 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 services.
- Supervisor includes a worker employed by the W-2 Contractor either directly or through a subcontract who supervises W-2 FEPs or RSs.

SUMMARY OF TRAINING REQUIREMENTS

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

New Workers

1. New Worker Training Program – curricula specific to job function (i.e. W-2 Up-Front Process; W-2 Eligibility; W-2 Placement and Ongoing Processes).
2. Domestic Abuse (12 hours for FEPs and W-2 Case Managers, 6 hours for RSs).
3. Introduction to the Americans with Disabilities Act (ADA) for W-2.
4. Introduction to Civil Rights.
5. Case management courses "W-2 Case Management: Assessment, Employability Plans, and Activity Assignment," and "W-2 Case Management: Maintaining Professional Objectivity, Composure & Boundaries."
6. New W-2 policy training as defined by the Bureau.

No FEP may make independent decisions related to eligibility or perform case management functions until the initial W-2 training is successfully completed (DCF 103.03 (1){b}).

No new RS may 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 (DCF 103.03 (1){c}).

Experienced Workers

1. New policy and refresher training specific to job functions and duties.
2. Enhanced Case Management (ECM) (12 hours each calendar year).
3. Professional development (12 hours each calendar year).
4. New W-2 policy training as defined by the Bureau.

New Supervisors

1. New Worker Training Program appropriate to the W-2 job functions of the staff they will supervise.
2. Domestic Abuse (12 hours for FEP Supervisors, 6 hours for RS Supervisors).
3. Introduction to the Americans with Disabilities Act (ADA) for W-2.
4. Introduction to Civil Rights.
5. New W-2 policy training as defined by the Bureau.

Experienced Supervisors

1. New policy and refresher training specific to job functions and duties.
2. Enhanced Case Management (ECM) (12 hours each year).
3. Professional development (12 hours each year).
4. New W-2 policy training as defined by the Bureau.

Following are the annual training requirements for experienced W-2 workers:

Enhanced Case Management Training

Twelve hours of ECM activities are an annual requirement of all experienced W-2 workers and supervisors within W-2. ECM programs develop the ability of supervisors and workers to provide quality services to all of their 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. DCF also promotes a strength-based approach to case management. ECM courses provide training in strategies necessary to assist participants in building on individual strengths.

These topics will be offered as classroom programs, or through alternate methods. Classroom programs will be offered on a regional basis or upon request.

ECM topics are identified as such in the course descriptions.

Waivers and Training Equivalencies

PTS recognizes that local W-2 Contractors routinely provide their workers with ongoing professional development. In order to recognize local expertise, PTS awards ECM equivalency to local agency training efforts which meet the ECM intent.

Waivers from the ECM requirement can also be granted to local workers engaged in educational programs that provide expertise in case management processes.

In order to evaluate W-2 Contractor equivalency requests, agencies must provide PTS 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. In the case of a waiver request, the workers name, a program description and the number of hours the agency would like to be considered for waiver must be included.

The procedure for ECM equivalency/waiver requests is as follows: email, FAX or USPS mail your waiver request with the supporting documentation to Tony Veeder, (anthony.veeder@wisconsin.gov) FAX 608/261-6376, 201 E. Washington Ave., Room A200, Madison WI 53708-8916.

Professional Development Requirement

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

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

ALL W-2 AND RELATED WORKERS

New Policy and Refresher Training

As new policy is developed and implemented, affected workers and their supervisors must attend the appropriate training sessions. The Bureau will identify additional training in response to operational needs. Course descriptions will identify the required programs

W-2 Agency Training Liaisons (ATL)

Each W-2 Contractor 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 Department's PTS.

The ATL 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 will assist BWF in assessing the training needs of their staff and may participate in the development and delivery of training products.

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

Training Records

Each W-2 agency is required to keep records of all training attended by each worker. This includes staff employed under direct contract or those employed under subcontract. The records must be maintained in an automated system that can sort by both training participant and training program information. At a minimum, the categories of information collected must include the employee name, position title, position hire date, training program, and date of program, number of hours attended, and sponsoring organization of the training. Approved waivers/equivalencies for ECM requirements must also be indicated.

A sample training report:

<u>Employee name</u>	<u>Position Title</u>	<u>Position Hire date</u>	<u>Training Program</u>	<u>Date</u>	<u>No. of hours</u>	<u>Sponsor Org.</u>
Sue Smith	FEP	01/02/13	W-2 Case Management: Assessment, Employability Planning and Activity Assignment	02/03/13-02/04/13	12	DFES/BWF
Sue Smith	FEP	01/02/13	The Role of Job Development in W-2	03/04/13	6	DFES/BWF
Sue Smith	FEP	01/02/13	Mental Health Diagnostics &	04/14/13	6	WETA

		Effects on Employment.			
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W-2 Contractors must sort training reports by training participant and submit them on a yearly basis to the PTS Section Chief by the second Friday in January.

PTS will also maintain training records for workers who attend DCF sponsored programs.

CONTACT:

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