



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

DFES 20-04

ISSUE DATE: 6/24/2020
DISPOSAL DATE: 12/31/2020

- 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 M. Chesnik
Division Administrator

RE: Changes to 2020 Required Training for Wisconsin Works (W-2) and Related Programs Workers

PURPOSE:

The purpose of this memo is to announce changes to the W-2 Agencies responsibility to:

1. Ensure that all W-2 workers are trained in accordance with [Administrative Rule Chapter DCF 103 W-2 Worker Training](#).
2. Document annual training completed by all W-2 Financial and Employment Planners (FEPS), Resource Specialists, and their supervisors during the previous calendar year.

BACKGROUND:

[Chapter DCF 103 W-2 Worker Training](#) outlines the training requirements for W-2 workers and supervisors. [Administrator's Memo 20-02](#), issued on January 21, 2020, outlines the W-2 agencies training responsibilities for contract year 2020.

On March 12, 2020, Governor Tony Evers issued Executive Order 72 declaring a health emergency due to Coronavirus Disease 2019 (COVID-19) and directing all state agencies to assist in the state's response to the public health emergency. On March 24, 2020, the state of Wisconsin was put under a "Safer At Home" order that directed Wisconsin residents to stay at home and ordered all non-essential businesses to close until April 24, 2020. On April 16, 2020, the "Safer At Home" order was extended to May 26, 2020. On May 13, 2020, the Wisconsin

Supreme Court overturned the extension to the Safer at Home order, ending the requirements ordered for the state. In response, some Wisconsin counties and municipalities established local orders to continue Safer at Home rules.

In order to ensure the safety and well-being of both W-2 Agency staff and our Partner Training Team, the Division of Family and Economic Security (DFES) has cancelled all in-person trainings for calendar year (CY) 2020. For this reason, DFES has also adjusted some of the training requirements for the remainder of CY 2020, as described below.

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

Financial and Employment Planner (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 (RS): 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:

Original 2020 Requirement	Revised 2020 Requirement	New Worker	New Supv	Exp Worker	Exp Supv
New Worker Training (NWT) Program appropriate to the specific W-2 job functions they will perform <i>(required during first 6 months of employment)</i>	No change	✓			
NWT Program appropriate to the W-2 job functions of the staff they will supervise <i>(required during first 6 months of employment)</i>	No change		✓		
Case Management courses:	The deadline for completion of the following case				

Original 2020 Requirement	Revised 2020 Requirement	New Worker	New Supv	Exp Worker	Exp Supv
<ol style="list-style-type: none"> W-2 Case Management: Assessment, Employability Plans, and Activity Assignment (FEP) Practical Applications in CWW (FEP) Strategies for Prioritizing W-2 Case Management Tasks (FEP) W-2 Case Management: Attaining the Work Participation Rate (FEP) <p>(Required within one year after NWT completion)</p>	<p>Management courses is suspended until further notice:</p> <ol style="list-style-type: none"> W-2 Case Management: Assessment, Employability Plans, and Activity Assignment Practical Applications in CWW Strategies for Prioritizing W-2 Case Management Tasks <p>Staff must still complete <i>W-2 Case Management: Attaining the Work Participation Rate</i>, as this is an online class.</p>	✓	✓		
<p>Domestic Abuse (12 hours for FEPs and 6 hours for RSs)</p> <p>(Required within one year after NWT completion)</p>	<p>The deadline for completion of the Domestic Abuse (12 hours for FEPs and 6 hours for RSs) course is suspended until further notice.</p>	✓	✓		
<p>Enhanced Case Management Training (ECM) (12 hours each year) (see additional detail below)</p>	<p>Enhanced Case Management Training (ECM) (6 hours) (see additional detail below)</p>			✓	✓
<p>Professional development (12 hours each year) (see additional detail below)</p>	<p>Professional development (6 hours) (see additional detail below)</p>			✓	✓
<ul style="list-style-type: none"> Deepening the Connection: DVR and W-2* (required within six months of hire) 	<p>No change</p>	✓	✓		
<ul style="list-style-type: none"> W-2 worker attendance at DVR regional meeting* (required annually) 	<p>The deadline for the W-2 and DVR collaboration meeting is suspended until further notice.</p>			✓	✓
<ul style="list-style-type: none"> New W-2 policy, process, and refresher training* 	<p>No change</p>	✓	✓	✓	✓
<p>Introduction to the Americans with Disabilities Act for W-2 (required upon hire)</p>	<p>No change</p>	✓	✓	✓	✓
<p>Introduction to Civil Rights (required upon hire and every three years thereafter)</p>	<p>No change</p>	✓	✓	✓	✓
<p>Program Security and Confidentiality (required upon hire and annually thereafter)</p>	<p>No change</p>	✓	✓	✓	✓
<p>Wisconsin Works Programs (WWP)</p>	<p>This was phase 1 training. It is not applicable to calendar year 2020.</p>			✓	✓

*Count toward the 12-hour professional development training requirement

Enhanced Case Management (ECM) Training

Typically, a minimum of twelve (12) hours of ECM activities is an annual requirement for all experienced W-2 workers and supervisors within W-2. The DFES Partner Training Team (PTT) offers these topics as classroom programs and through alternate methods. While classroom programs are offered on a regional basis or upon request, due to the cancellation of all in-person trainings in CY 2020, a minimum of six (6) hours of ECM activities is required for CY 2020 for all experienced W-2 workers and supervisors and will need to be accessed through alternate methods.

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 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.

ECM topics are identified as such in the course descriptions.

Professional Development Requirement

Typically, a minimum of twelve (12) hours of professional development is an annual requirement for all experienced W-2 workers and supervisors. In keeping with the need to maintain social distance in 2020, a minimum of six (6) hours of professional development activities is required for CY 2020 for all 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.

“Deepening the Connection: DVR and W-2” online training: This training counts toward professional development training hours. The partnership between the W-2 program and DVR gives individuals with disabilities access to a greater range of supports, services, and information that will expedite the achievement of their employment goals. New FEPs are required to complete the *“Deepening the Connection: DVR and W-2”* online training within six months of hire. All FEPs are required to participate in a W-2/DVR collaboration training at least once per calendar year. Subsequent training is to be accomplished by W-2 staff attending a regional meeting with DVR staff to discuss local collaboration and ways to work together more effectively. In keeping with the need to maintain social distance in 2020, the requirement that all W-2 staff attend a regional meeting with DVR staff for CY 2020 is waived.

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 comparable 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.

Local workers engaged in educational programs that provide expertise in case management processes can request a waiver for ECM requirements. 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 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 BWF's training programs, and participating in the development and evaluation of BWF'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 Agencies are responsible for the general development of their employees and for training not offered by PTT. It is the W-2 Agency's responsibility to ensure that workers have the skills needed to perform job functions.

TRAINING REPORTS:

Quarterly Reporting

This is a new requirement. Starting with the second quarter of CY 2020, W-2 agencies are required to submit a quarterly version of the annual report that documents training completed by all W-2 FEPS, Resource Specialists, and their supervisors during the calendar year.

Agencies must use the BWF spreadsheet to capture quarterly training completion, including training that has been taken as a result of an approved training equivalency or waiver. 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.

W-2 Agencies must send their completed quarterly training spreadsheet to their Regional Coordinator/Administrator by the second Friday of the month following each quarter, starting with July 10, 2020, for the second quarter of 2020.

The purpose of quarterly reporting is to assist agencies in meeting annual training requirements. With quarterly reporting, agencies will be able to assess their progress toward meeting annual training requirements and the regional staff and PTT will be able to assist agencies as well in meeting the requirements.

Annual Reporting

There is no change to this requirement. W-2 Agencies must send their completed annual training spreadsheet to David Turk, PTT Training Coordinator/Liaison (david.turk@wisconsin.gov) by the second Friday in January of each calendar year for the prior calendar year.

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

W-2 AGENCY RESPONSIBILITY:

Each W-2 Agency shall ensure that all W-2 workers are trained in a timely manner on all W-2 policy and procedure and automated system updates that are issued by the department. [DCF Administrative Rule 103.06]

New Worker Training (NWT): FEPs cannot make independent decisions related to eligibility or perform case management functions until the NWT 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 NWT is successfully completed. [DCF 103.03(1) (b) & (c)]

Failure to meet NWT training requirements as well as all other training requirements outlined in this memo and in the W-2 and Related Programs Contract, Appendix C, Scope of Work, Section III. E. may result in a penalty. Penalties are outlined in Appendix E, Terms and Conditions Relating to Payments, Section E. of the contract. However, with increased reporting and technical assistance from regional staff and with the adjustments that we have made with result to COVID-19, the expectation is that all agencies will meet the annual training requirements.

CONTACT:

Margaret McMahon
Bureau of Working Families Director
TEL: 608-422-6273
E-MAIL: margaret.mcmahon@wisconsin.gov