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State of Wisconsin
Governor Tony Evers



TO: **W-2 Agencies
Training Staff**

FROM: Margaret McMahon, Director
Bureau of Working Families
Division of Family and Economic Security
Department of Children and Families

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| BWF OPERATIONS MEMO | | | | | | | |
| No: | 19-17 | | | | | | |
| DATE: | 09/20/2019 | | | | | | |
| W-2 | <input checked="" type="checkbox"/> | EA | <input type="checkbox"/> | CF | <input type="checkbox"/> | JAL | <input type="checkbox"/> |
| RAP | <input type="checkbox"/> | TMJ | <input type="checkbox"/> | TJ | <input type="checkbox"/> | Other EP | <input type="checkbox"/> |

SUBJECT: Clarification of Career Assessment Requirements and Standards

CROSS REFERENCE: [BWF Operations Memos 17-12](#) and [19-02 W-2 Manual, 5.1 Assessment Introduction](#)
[W-2 Manual, 5.1.1 Assessment at Application](#)
[W-2 Manual, 5.4.1 Career Assessment Overview](#)
[W-2 Manual, 5.4.2 Career Assessment at Application](#)
[W-2 Manual, 5.4.3 Using and Documenting Career Assessment Results](#)
[TANF-ACF-IM-2016-05](#)

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this memo is to announce a new W-2 Manual section for Career Assessment, which clarifies career assessment requirements and standards.

BACKGROUND

W-2 agencies are required to conduct career assessments with all W-2 applicants and participants to assess career interests and aptitudes by using career assessment tools that measure work styles, skills, and interests. This requirement is contained in Bureau of Working Families (BWF) [Operations Memo 17-12](#) and W-2 Contract Section C - Scope of Work.

In 2016, the Administration for Children and Families (ACF) released Temporary Assistance for Needy Families (TANF) Information Memorandum (IM) [TANF-ACF-IM-2016-05 \(Supporting Career Pathways for TANF Recipients\)](#). "ACF's Office of Family Assistance (OFA) encourages TANF agencies to adopt policies and practices that will connect families to robust and tailored career pathways to help parents receive the training and credentials they need to obtain jobs

with family-sustaining wages.” In accordance with this federal guidance, BWF has continued to develop policy regarding the use of career-focused assessments during the informal assessment process and throughout ongoing case management.

In February 2019, BWF implemented phase 1 of the Wisconsin Work Programs (WWP) system to modernize data collection for a portion of W-2 assessment functions. See BWF [Operations Memo 19-02](#) for information on updates to W-2 assessment policies and informal assessment enhancements.

BWF convened an assessment workgroup to review and examine the use of career and vocational assessment tools by Wisconsin Works (W-2) agencies and their Financial and Employment Planners (FEPs). The workgroup’s efforts resulted in BWF [Operations Memo 17-12](#), which expanded and clarified the definitions of career assessment, educational needs assessment, and vocational assessment as well as the work presented in this memo.

POLICY UPDATES

W-2 policy updates are summarized below. Relevant W-2 Manual sections are attached with all policy changes incorporated. Policy that was deleted is struck through and policy that was added is underlined. New sections are clearly denoted.

ASSESSMENT - INTRODUCTION

Current Policy

Certain types of assessment are required for all W-2 applicants and participants, including informal assessment and educational needs assessment.

Updated Policy

BWF revised section 5.1 to specify that career assessment is required for all W-2 applicants and participants.

[See attached updated W-2 Manual section 5.1.](#)

ASSESSMENT AT APPLICATION

Current Policy

During the application process and prior to placing the individual in a W-2 placement, the W-2 agency must work with applicants to complete an informal assessment.

Updated Policy

BWF revised section 5.1.1 to specify that FEPs must work with applicants to start the process of career assessment at application.

[See attached updated W-2 Manual section 5.1.1.](#)

CAREER ASSESSMENT OVERVIEW

Current Policy

Career assessment is a broad spectrum of assessment tools that W-2 agencies, applicants, and participants use to obtain greater awareness about how an individual's work styles, skills, and interests can be used to define a career path, assign meaningful activities, highlight strengths, identify training needs, and match the individual to employment opportunities.

New Policy

BWF created W-2 Manual section 5.4.1 to specify that more than one tool may be required to capture the following required elements:

- *Work styles* – Refers to an individual's patterns of action or conduct, such as attendance, punctuality, appropriate appearance, ability to work with others, obeying rules, following directions, and completing tasks. Work style-focused career assessments can demonstrate the individual's attitudes and job readiness.
- *Skills* – Refers to an individual's skills or understanding of specific tasks related to employment, like cooking or computer programming. Skills-focused career assessments can include knowledge, aptitude, and ability. Skills can relate to a particular occupation, as typically listed in a job announcement to describe the tasks of a position.
- *Interests* – Refers to an individual's likes of particular objects, activities, and values using the theory that people with the same career tend to have the same interests. Interest-focused career assessments help individuals identify work-related interests and find the types of careers that match. The results can be used to help individuals learn which careers they are most likely to enjoy.

[See attached new W-2 Manual section 5.4.1.](#)

CAREER ASSESSMENT AT APPLICATION

Current Policy

W-2 policy requires that participants complete an informal assessment as part of the process of application and Employability Plan (EP) development. Career assessment is a component of the informal assessment, but policy does not specify the timeframes for career assessment.

New Policy

BWF created W-2 Manual section 5.4.2 to specify timeframes for career assessment at application. If an applicant is new to W-2 or is re-applying and does not have a career assessment documented, a career assessment must be scheduled within 30 days of application and completed within 30 days of placement.

[See attached new W-2 Manual section 5.4.2.](#)

CAREER ASSESSMENT STANDARDS

Current Policy

Results from career assessment that evaluate work styles, skills, and interests must be covered as part of the informal assessment process and reviewed with each W-2 applicant or participant at application and as a part of ongoing case management.

New Policy

With the implementation of WWP, informal assessment information is gathered through the Informal Assessment Driver Flow. The functionality to capture career assessment results will be included in the next phase of WWP but for now remains in the Client Assistance for Re-employment and Economic Support System (CARES) work programs subsystem. BWF created W-2 Manual section 5.4.3 to specify documentation of career assessment results requirements in CARES.

[See attached new W-2 Manual section 5.4.3.](#)

CARES, CARES WORKER WEB (CWW), or WISCONSIN WORK PROGRAMS (WWP)

There are no changes to CARES, CWW, or WWP.

TRAINING

The Partner Training Team is updating training materials to reflect these policy updates.

AGENCY ACTION

W-2 agencies must provide written notice of the career assessment tool(s) they are using, including an explanation of how the tool(s) evaluate work styles, skills, and interests, to their Regional Administrator (RA) or Regional Coordinator (RC) within 90 days of the release date of this memo.

The RA or RC will use the requirements of W-2 Manual section 5.4.1 to review the tool(s). W-2 agencies are encouraged to reach out to their RA or RC with questions.

Agencies using career assessment tool(s) that do not meet the policy requirements will need to select alternate tools. W-2 agencies are responsible for any costs associated with procuring a career assessment tool(s). There are a number of tools that are available at no cost.

Six months after the RA or RC reviews are complete, the assessment workgroup will seek feedback on the rollout and use of the career assessment tools to determine how applicants, participants, and staff respond; whether there is increased engagement in activities, i.e. less non-participation; and if there is increased use of the career assessment activity codes.

W-2 agencies must discuss the policy updates and clarifications with staff. W-2 agencies must also update any relevant local agency procedures.

ATTACHMENTS

[Updated W-2 Manual section 5.1 Assessment Introduction](#)

[Updated W-2 Manual section 5.1.1 Assessment at Application](#)

[New W-2 Manual section 5.4.1 Career Assessment Overview](#)

[New W-2 Manual section 5.4.2 Career Assessment at Application](#)

[New W-2 Manual section 5.4.3 Using and Documenting Career Assessment Results](#)

CONTACTS

For W-2 Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators

For W-2 Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For W-2 CARES or WWP Functionality Questions: W-2 Help Desk

DCF/DFES/BWF/DH