

Workforce Central Phase One Evaluation Prepared by Yellow Wood Associates

Purpose

This phase one evaluation captures progress and lessons learned during the start-up phase of Workforce Central and sets out the structure for ongoing local evaluation. The evaluation is intended for use by Workforce Central and the National Fund for Workforce Solutions (NFWS) as part of their national evaluation effort.

The evaluation is based on a combination of key informant interviews, site visits, capacity-building workshops, trainings, and documents reviewed by the staff of Yellow Wood Associates. Specifically, since becoming local evaluators in April 2009, Yellow Wood has delivered a You Get What You Measure® workshop to the Workforce Central Advisory Council, conducted baseline interviews with the Funders' Collaborative as a whole and six individual members; conducted baseline interviews with five advisors that are also service providers in the workforce development system, the facilitator of the HR Roundtable, the NFWS site coach, and the Project Director for Workforce Central. In addition, Yellow Wood has provided an overview on outcome funding approaches to the Funders' Collaborative, training on interviewing for volunteers who will be implementing the service providers' survey, and learning coach services to the Project Director. We have also assisted in drafting the service provider survey instrument and an instrument for gathering baseline data from employers. Yellow Wood participated in the NFWS Peer Learning Meeting and Digital Literacy Conference in April 2009 and on two conference calls to discuss the interface between the local and the national evaluation.

Yellow Wood uses a participatory, capacity-building approach to evaluation described in greater detail in Appendix A: The Process of a Learning Evaluation. Evaluation for the start-up phase of a project involves collecting information on baseline conditions including attitudes and understandings, and establishing clear goals and measures of progress. Baseline measurement is currently underway with results to be included in the year two evaluation report.

Context and Preconditions

Located in central Wisconsin, Greater South Wood County is a rural area covering 823 square miles and home to 40,000 people. The economy of Greater South Wood County has historically been closely linked to the paper industry. In 2000, when the domestic paper industry began to collapse and a key employer moved its headquarters overseas and others began significant downsizing, the area entered a period of economic crisis. In response, the Community Foundation of Greater South Wood County, in cooperation with Heart of Wisconsin Business and Economic Alliance, began the Community Progress Initiative (CPI), an effort to transform the culture of community from one of dependency and



despair to one of self-reliance, innovation, and hope. The Community Progress Initiative brought the community together in various ways to envision a new future, set goals and discover shared values over a period of years immediately preceding the NFWS initiative.

Between 2000 and 2008, Greater South Wood County lost about 39% of existing jobs. As a result of the recent recession, from June 2008 to June 2009, the unemployment rate in Wood County grew from 4.8% to 9.2%. In the second quarter of 2009, 3,308 people in Wood County were unemployed and claims for public assistance were up by 21.5%. Over the same period, employment fell by 700 jobs¹

In a period of structural adjustment, when new jobs are not likely to require the same kinds of skills as jobs held previously, workforce development is essential to revitalizing the economy. In South Wood County, it has become clear that the majority of paper industry workers lack computer skills and other skills, including “soft skills,” essential for success in today’s economy. This, combined with an aging labor force, puts a premium on re-training for workforce success.

In 2008, a Core Partners group led by the Community Foundation of Greater South Wood County that included Mid-State Technical College, Heart of Wisconsin Business and Economic Alliance, and the North Central Wisconsin Workforce Development Board came together to prepare the proposal to the National Fund for Workforce Solutions. Nearly all the members of the Core Group had participated in the Advanced Leadership Institute (ALI) sponsored by the Community Foundation of Greater South Wood County as part of the Community Progress Initiative. ALI was a direct outcome of CPI and continues to provide training in adaptive skills through the support of the Ford Foundation. This previous investment in building a cohort of social change agents resulted in the capacity to respond to the NFWS opportunity effectively.

In November 2008, “Partners for Workforce Innovation” was awarded a grant from the National Fund for Workforce Solutions (NFWS) and became one of two rural sites in the country implementing the NFWS model for workforce development. The Community Foundation of Greater South Wood County (CFGSWC) served as the lead organizing entity and was the fiscal agent for the grant that was matched by a collaborative of local funders including local foundations, employers, and the North Central Wisconsin Workforce Development Board as an aligned funder. Collaboration of local funders was an essential ingredient in establishing a relationship with NFWS. Jennifer Riegenbach was hired as Project Director in February 2009 and Yellow Wood Associates was hired as evaluators in April 2009. The program is now known as Workforce Central.

Goals as articulated in the NFWS MOU of October 2008 were:

- To create a sustainable funders’ collaborative that will operate with a long-term orientation and invest in transforming workforce development in the region
- To connect employers and funders to provide a lasting solution to the challenges employers face in hiring and retaining skilled workers
- To develop pathways for advancement within their companies in concert with realistic compensation plans

¹ Association for University Business and Economic Research, CWERB-Division of Business & Economics, University of Wisconsin-Stevens Point.

As of May 2009, the overall goals of Workforce Central had been further articulated as:

- A funders' collaborative invests in employer needs and in transforming workforce development over the long term.
- An advisory council is actively engaged in transforming the workforce development system.
- New, incumbent returning and dislocated workers have skills and support and participate effectively in the labor market.
- Employers, including entrepreneurs, in the target region are able to hire and retain skilled workers.
- Workers in the target region have jobs that offer advancement and realistic compensation.
- Articulated career pathways exist in healthcare, manufacturing, technology, and skilled trades.

By September 2009, based on priorities established by the Funders and Advisors, core goals had been refined to:

- Employers are able to hire and retain local skilled workers at family sustaining wages.
- Workers (including low skilled, low-income and incumbent workers) have the skills and support they need to successfully participate in a vibrant local labor market.
- Articulated career pathways exist in industries vital to our region.
Policies support workforce partnerships, employers, and workers.

Goal refinement is a natural part of project development. While engagement by funders and advisors continues to be essential to the long-term success of Workforce Central, the goals currently reflect desired external outcomes.

Baseline Conditions of the Workforce Development System in South Wood County

One funder offered this succinct description of baseline workforce development conditions in Greater South Wood County before Workforce Central: *“There are a lot of different players, but a fragmented approach, which is not necessarily well connected to employers in the community. The local workforce development board has a very large territory it’s responsible for, which is not necessarily developed around an economic region as it is an arbitrary geography. The needs vary greatly across the workforce development board region. Funding sources are tied to specific issues, not necessarily aligned well with employer needs.”*

In describing the attitudes of local residents, another participant said, *“The folks who have been lifelong residents have a tendency to be negative. They can’t get beyond what we will do besides being a paper mill town. They don’t see what is happening with the hospital, Ocean Spray, emergent companies not tied to paper. These people have been really insulated toward the changing world for too long. More of our people who have migrated here or migrated back see opportunities.”*

Changing these baseline conditions requires a change in the prevailing culture.

A Systems Approach to Culture Change

The Community Foundation of Greater South Wood County (CFGSWC), which has been the main driver behind Workforce Central, thinks big and takes a long-term perspective on community economic development. In keeping with the mission, vision and values of the CFGSWC, their approach to developing the workforce goes beyond interventions on behalf of individuals to a commitment to change the system in several key ways. Specifically, Workforce Central seeks to:

- influence the way current employers in advanced manufacturing think about, train and engage their employees in growing their businesses; *
- deepen the understanding of support service providers about their roles in workforce development;
- strengthen the connection between providers of training and employers so that training becomes demand-driven and confidence is built between employers and trainers, and
- enlarge the vision of workers to include employment in emerging companies and companies outside the paper-making industry.

* Advanced manufacturing is the initial focus but not the exclusive focus of Workforce Central. Lessons learned by working with advanced manufacturing employers will be used to engage employers in additional sectors.

Each of these intended outcomes requires changes in the prevailing culture, changes which will take time to come to fruition.

Funders' and Advisors' Baseline Understanding of Workforce Central

Many key stakeholders seem to grasp the complexity of a systems approach. As one advisor with no previous experience in workforce development put it,

“Workforce Central exists to promote and build an environment in our community in which people who are wanting to be employed can be employed with a livable wage. It’s more about connecting the pieces in the community: education, employers and the potential workforce. It’s building pathways for people. That’s what we are about. It’s more than jobs. It’s about more than that. It’s the whole systems thing working together.”

Other advisors and funders understand Workforce Central more narrowly as evidenced by their description of its goals. For example, ***“to improve the workforce’s ability to train to be successful in today’s economy. To bring more jobs and employment to our community,”*** or ***“to create opportunities for individuals within our community to raise their level of skills, whether they are existing workers or prospective workers coming into the workforce, to the point that allows them to be self-sufficient, which will benefit them and employers in our community.”*** Many are still trying to understand both the structure and process of a systems approach. It will be interesting to see how this understanding evolves over time.

Strategic Elements

The Workforce Central strategy has been summarized as:

1. Convene community stakeholders for shared learning and comprehensive planning.
2. Fund worker training that will have a direct and sustainable impact on business.

3. Build the capacity of organizations to enhance the local network of services available to workers and job seekers.
4. Advocate for public policies that support workers and employers.

These activities take place in a larger strategic context which includes:

Working within the boundaries of a lived region. Rather than define the target area by reference to political boundaries, Workforce Central defines its target area based on the configuration of the shared labor pool. This makes sense from the point of view of growing the skills of the labor force and engaging relevant employers but is challenging from both data and government administrative perspectives. Data is configured to county boundaries, not sub-county regions. There are seven different zip codes in Workforce Central's target region. Government agencies divide the geographical area in ways that do not correspond to labor pool boundaries. When boundaries don't coincide, it is even more difficult to foster cross-agency cooperation and focus government resources on areas of need. Businesses and workers in a lived region have a shared sense of their economic situation and the opportunity to impact it.

Building an intermediary from the ground up. Through months of community assessment, Workforce Central determined that the conventional, urban-based workforce development model of division of organizational labor between funders and builders of workforce partnerships (intermediaries) is not realistic as a first step for the target region at this time. CFGSWC has been remarkably successful in creating and sustaining a Funders' Collaborative, the members of which are becoming increasingly savvy about workforce development. However, when it came to engaging employers, no single organization existed outside CFGSWC with the requisite credibility. CFGSWC has that credibility. Stakeholders in the region need time to better understand the NFWS model for workforce development. Therefore, CFGSWC and the Funders' Collaborative agreed in June to use CFGSWC to incubate Workforce Central as an intermediary with the intention that it will spin off into a separate entity. The Funders are looking to Workforce Central to continue to pull in and align public dollars, pool resources, and help businesses understand their role in workforce development and the return on their investment. CFGSWC and the Funders Collaborative must continue to walk a delicate line between managing and building the capacity of Workforce Central within its walls and releasing resources into the community to build the capacity of other organizations to play meaningful roles in the workforce partnership model.

Identifying and adapting models that work. Workforce Central is not trying to reinvent the wheel. Rather, they have looked to models that work and can be adapted to rural Wisconsin, such as the West Central Initiative (WCI is a rural community foundation serving West Central MN) employer engagement model. The Workforce Central approach, which included focus groups with employers in the target region, presentations on the WCI model in Wisconsin and a site visit to Minnesota, has allowed employers, funders, and advisors to see what is possible and gain the confidence to move ahead in new ways. It has also provided Workforce Central with resources, mentoring, and tools that are reducing the time required to implement a new approach. Workforce Central intends to continue to identify and adapt best practices for other aspects of its emerging model.

Focusing on relationship building and thoughtful engagement. In rural communities, there are relatively few people, often wearing many hats. Relationships are often long-term and shaped by past experience, both positive and negative. Skepticism and protectionism co-exist with a willingness to

try new things. Personalities are real factors that must be taken into account in negotiating change. Like any effort of this type, Workforce Central has faced challenges in aligning key players around a shared vision. Progress has been made through thoughtful inclusion of key players including employers, services providers and funders; a high degree of transparency; and creating venues such as regular meetings, site visits, workshops, presentations, conferences, and participatory research opportunities that facilitate building and re-building relationships. Workforce Central has recognized that the best way to overcome resistance is through respectful engagement with key stakeholders, many of whom have multiple avenues of influence, e.g. through board memberships, volunteering, etc., in the larger community. Toward this end, the North Central Wisconsin Workforce Development Board has been included in the Funders' Collaborative. Mid-State Technical College (the area's largest training provider) and Heart of Wisconsin Business and Economic Alliance have been included as Advisors. Workforce Central is also engaging organizations with grass roots histories such as Opportunity Development Centers, The Family Center, and Christian Life Fellowship that serve specific populations such as disabled, domestic violence victims, and ex-offenders.

Integrating capacity building and ongoing learning for a wider audience. CFGSWC chose Yellow Wood as their local evaluator in part because they value a learning and capacity-building approach to evaluation; this approach is consistent with over a decade of investment by CFGSWC in capacity building strategies throughout the region. Part of the Workforce Central strategy is to build the capacity of community members and the organizations in which they work to understand systems and systems thinking, recognize the value of shared information, and to learn and use basic research skills and new concepts such as expanding approaches to outcome funding. In addition, CFGSWC is working to integrate other initiatives including the Knight Community Information Challenge (KCIC) and their discretionary grantmaking in support of Workforce Central and community-wide cultural change.

Workforce Central was conceived of by CFGSWC as part of an integrated approach to community development

Therefore, many of the workshops and trainings offered through Workforce Central are attended by CFGSWC staff working on other related initiatives and vice versa. There is an expectation that tools like You Get What You Measure® and a new approach to outcome funding will add value to work throughout the community and within CFGSWC. This is likewise true of Workforce Central staff, Advisors and Funders participating in CFGSWC's broader capacity building strategies.

Drilling down for effective implementation. At the outset, the Core Group of Partners envisioned four sector focus areas: Advanced Manufacturing, Information Technology, Health Care, and Skilled Trades, to which Green Business was later added. The concept of "green" business was not well understood within the community. Today, the initial sector focus has been narrowed to Advanced Manufacturing, an area where employer relationships have been established and where the greatest wage and benefit opportunities exist. There is also a robust model in WCI promising significant progress over time available for immediate adaptation. By focusing resources where there are early opportunities for success, Workforce Central hopes to build visibility and credibility among a growing number of employers while demonstrating that this initiative is not just "more of the same" but offers tangible, bankable benefits to employers as well as workers. Information Technology is being addressed from a larger community systems lens in part through CFGSWC's

participation as a Knight Community Information Challenge site and strategies are under development with Mid-State Technical College, the Workforce Board and the HR Roundtable to begin to address information technology as an occupational sector.

Responding to demographic challenges. Greater South Wood County has a population of older workers; many were laid off from years of employment in the paper industry and others were employed in businesses facing increased competition in tough economic times. In fact, Wood County has the oldest population of any county in Wisconsin. The Workforce Central response is to begin with a focus on incumbent worker training that will demonstrate the potential of re-tooling an aging labor force while engaging an emerging labor force. ***“Dislocated workers have come to MSTC [Mid State Technical College] who have told stories of not being in classrooms for 20 years. They are graduating college at the same time as their child is graduating from high school. Without layoff notice, they would have never taken this opportunity to switch careers. There’s a lot of pain and these folks are working through that. Once they did, they had hope. Faculty have talked to me about positive changes in classes, where adults are there to learn and this sets expectations for younger students.”*** As Workforce Central evolves, opportunities in the Health Care sector related to an aging population are likely to be further explored.

Strategic Partners

The Workforce Central model is designed around three basic building blocks – the Funders Collaborative, the Advisory Council, and Workforce Central staff. Funders were not organized into a collaborative prior to Workforce Central. The CFGSWC considers a funders’ collaborative that is building relationships and learning about workforce development to be a key component of a systems change strategy

Members of the ***Funders’ Collaborative*** have directly contributed dollars and other resources to support the work of Workforce Central. Together, funders have raised \$1.2 million to support Workforce Central. The Funders’ Collaborative is responsible for determining how their own funds, NFWS funds, and other funds raised to support Workforce Central will be spent. In particular, the Funders’ Collaborative will be developing and implementing at least two RFPs, selecting grantees, and monitoring performance with support from Workforce Central staff, the CFGSWC and Yellow Wood Associates. The Funders’ Collaborative includes CFGSWC, Alexander Charitable Foundation, Wood Trust/Bell Family Charitable Foundation, Riverview Health Care Foundation, R.C. Charitable Foundation, Paper City Savings Charitable Foundation, Ocean Spray Cranberries, Urban Processing, LLC, NewPage Corporation, Solarus, North Central Wisconsin Workforce Development Board (NCWWDB) and the National Fund for Workforce Solutions.

The Funders’ Collaborative was engaged in preparing the NFWS proposal, began meeting bi-monthly in April 2009 and has met monthly since August, indicating an intensifying level of interest and engagement. Funders know the community and employers; however, with the exception of the NCWWDB, they know very little about workforce development. Their greatest concern is that the funds they are stewarding be used effectively. They are relying on the Advisors and Workforce Central staff to provide information and insights from a more hands-on perspective.

Yellow Wood conducted a collective baseline interview with the Funders’ Council in May 2009 to gauge their understanding of Workforce Central and their role in it as well as the relationship they

saw between the Funders' Council and the Advisors. Funders identified their roles as vocal ambassadors for Workforce Central within the community who can educate other donors and bring in additional employers and as a group with fiscal and decision-making authority over how the money received by Workforce Central is distributed. They also see themselves as learners who need to better understand the theory of change behind Workforce Central and where their investment will have the greatest impact. At the May 2009 focus group, staff of the Foundation appeared primarily focused on bringing in additional resources by researching imminent American Reinvestment and Recovery Act (ARRA) opportunities while funders were primarily concerned about how they were going to distribute resources already in hand.

Baseline interviews with six funders were conducted in June and July 2009 to further gauge their understanding of their role, knowledge of workforce development, understanding of Workforce Central, and their perceptions of challenges in making sure funding is put to good use.

Funders are meeting new people and expanding their networks through their engagement with the Council.

“The Funders Committee will provide a great avenue for that because of the work it’s doing with the Advisory Group. Providers of workforce development services and the Funders Group in general have not been as well networked as they should be. I see that as creating an excellent avenue to expand and widen those networks.”

“I think the challenge is to overcome some of the institutional biases. There are some people who just have an idea of how the structure is supposed to be and want to keep it that way permanently. They want to keep things the way they are... rather than doing something new. We need to overcome that resistance.”

Funders are gaining insights into the existing workforce development system. For example, one funder has observed that larger employers who are restructuring and have displaced workers have gotten the lion’s share of attention from service providers. ***“Smaller employers who tend to be the growth engines are largely ignored through that process. As we make contacts at these smaller companies, they’re asking: why me?”***

To date, Funders have approved a grant to support the **HR Roundtable**. Support has been approved to pilot the **Incumbent Worker Training Fund** and the **CEO Peer Council** that will launch the advanced manufacturing employer strategy. The first step in implementation, hiring a coordinator, has been accomplished. The service provider network will be developed through a **Workforce Partnership Fund** that will focus on reducing barriers to training and employment. A subcommittee of Funders has agreed to work on developing an outcome-based funding process during the first and second quarters of year 2 including RFPs and proposal packets, training for applicants, review process and investor protocols for ongoing relationships with grantees as called for with an outcome funding approach. ***“The high priority of funders is to develop a grant framework so that it forces prospective grantees to think about how they can use the money in a way that creates positive impactful outcomes. That’s potentially in the short run a big issue to get beyond, educating ourselves and potential grantees about how to think differently about how they use the money.”***

The **Advisors** are providers of workforce training and support services in Greater South Wood County. Funders are looking to Advisors for insights into how the workforce development system works now and how it can be improved. The Advisors' role is to provide guidance and feedback to the Funders' Collaborative. Advisors are taking the lead in participatory research to better understand the full range of workforce and support services already available in the area. As relationships develop and understanding and trust grows, new opportunities to strengthen connections and performance between and among workforce trainers and support service providers will be revealed and developed. Advisors include: Aging and Disability Resource Center of Central Wisconsin; Child Care Resource & Referral; Christian Life Fellowship; City of Wisconsin Rapids; Community Foundation of Greater South Wood County; The Family Center; Heart of Wisconsin Business and Economic Alliance; Ho-Chunk Nation; John Edwards High School; Labor Employment and Training Center (LETC); Literacy Council of Wood County; Mid-State Technical College; North Central CAP; North Central Wisconsin Workforce Development Board; Opportunity Development Centers Inc (ODC); Riverview Hospital Association; Wisconsin Housing and Economic Development Authority (WHEDA); Wood County Social Services; Wood County Probation and Parole; United Way of Inner Wisconsin; University of Wisconsin - Stevens Point; and ZAXX Technology Specialists.

The Advisors met twice as a group, in April and August 2009. Beginning in August, Advisors agreed to meet monthly. In addition, many Advisors participated in the You Get What You Measure® workshop in May and several participated in interviewer training in September 2009. Baseline interviews with five advisors from the United Way, the Aging and Disability Center of Central Wisconsin, Mid-State Technical College, Christian Life Fellowship, and Heart of Wisconsin Business and Economic Alliance were conducted in September 2009 to learn more about the nature of their involvement with Workforce Central, their perceptions of future plans, current challenges and existing attitudes about workforce development efforts in Greater South Wood County.

Perhaps the most important aspect of the Advisors group is that it has brought a wide variety of support service providers together with training providers and employers and allowed them to begin to see themselves as part of the same system.

“We never had this bonding before with non-profit and commercial side of things. We never dealt with manufacturers before in a project or educational facilities. That’s been surprising that they’ve been successful in bringing all these people together. There’s a need.”

“It’ll start with the advisory committee... We’re trying to get non-profits speaking the same speak, so that they’re not at odds with each other. It’s taking care of what you do. Many don’t realize what others are doing... Our church has tons of programs that nonprofits and county workers don’t know we have. That’s been one of my personal dreams... to know what people are doing so we can help people.”

“I think discovering that we have a big role. We know what we do in the community. The surprise is how we all work together and what a difference it can make. I knew everyone in the group before. For example, the individual who runs our domestic abuse shelter was wondering why she’s involved. Then the group started examining relationships. People started throwing out ideas of how she can be connected and useful. It’s a process of discovery.”

New relationships are being forged within the Advisors group and, by virtue of activities in which Advisors are engaged, many are expanding their networks even further. For example,

“In terms of Workforce Central, opportunities for technical assistance or side trips of best practices (like the trip to WCI in MN) will expand the network for us in meaningful ways. As that happens, in the technical college system, we have a group that consists of my counterparts in instruction. We meet regularly. Even though it’s not an expansion of my professional network, it would be connecting with other organizations. For example, the urban counterpart to Workforce Central is in Milwaukee. Their technical college’s VP of Learning sits on this committee too. This opens the door to conversations about this initiative and roles that technical colleges may play in the area. This adds a new dimension to existing networks. If there is a particular role for community colleges in Minnesota, Al has gotten names of his counterparts to see how they did what they did.”

“Challenges are that there are a lot of people. We need the right approach. Do you go to the plant manager or the head of the board? Who do you talk to? This is a growth experience for myself to connect with others. I see myself as a facilitator to get this out to the public. It’s about letting it go to the community. I’m meeting new people all the time in this process. It is expanding and enhancing networks through the marketing campaign and through Workforce Central. I don’t remember when the light bulb went on but it did.”

With the exception of one member of the Advisors group who expressed frustration at the lack of recognition of the role of their organization in the mix, the major frustration shared by others has to do with a sense of urgency. While Advisors uniformly recognize the value in taking time to plan and understand before they act, they are mindful of the needs in the community and look forward to taking concrete actions to meet those needs.

The largest immediate challenge of getting the “right” people to the table seems to have been met. ***“At the first meeting, I wasn’t sure who was on board. When I got there, it totally made sense when I looked around. We got the right people at the table and this has a great chance of working.”***

Although the formal interventions planned by Workforce Central around incumbent worker training and barrier reduction are not yet on the ground, the work has clearly begun and new relationships are being formed that help participants understand the larger system of which they are a part. For example, the North Central Wisconsin Workforce Development Board has invited Jennifer Riggerbach to serve on its Strategy Committee. The comfort level providers have with one another is likely to be a key factor affecting improved service delivery. To this end, the 2009 class of the Advanced Leadership Institute is comprised of many Workforce Central Advisors.

Workforce Central has been staffed by Jennifer Riggerbach, Project Director, since February 2009 with part-time administrative support from Kim Shields. Kristi Anderson, student intern, assisted Jennifer over the summer of 2009. In October 2009, John Bergin of Technical and Investor Consulting, LLC joined Workforce Central on a part-time basis as the employer liaison. John has a background in the paper industry and is known and highly regarded by employers in the community. Workforce Central staff is housed at the CFGSWC and benefits from the leadership, relationships and access to networks within and outside the community provided by its Director Kelly Lucas and

from the Finance, Communications, Community Development departments and staff of the Foundation. Kelly Lucas chairs the Funders' Council and contributes substantial in-kind assistance to guide Workforce Central. Workforce Central staff provides strategic direction and implementation support for the Workforce Central initiative. Workforce Central coordinates the Funders and Advisors and is acting as the workforce intermediary as defined by NFWS. Workforce Central is in the midst of defining what it means to be a workforce intermediary in South Wood County in terms of its own capacity needs, program, policy, staffing, funding, and relations to employers, workers, trainers and service providers.

The development of Workforce Central has been usefully informed by expertise provided by and through the National Fund for Workforce Solutions. John Molinaro of the Aspen Institute has been instrumental in shaping Workforce Central's employer engagement strategy and providing access to the Minnesota West Central Initiative model. Stacey Wagner, the Jobs for the Future (JFF) coach for Workforce Central, has taken her work beyond the JFF definition of coach to being a technical assistance service provider to the site. She has had ongoing regular conversations that helped educate stakeholders about workforce development and shaped the decision to incubate a workforce partnership rather than outsource to another organization. She has helped Workforce Central navigate through the opportunities provided by ARRA, particularly with respect to engaging the North Central Wisconsin Workforce Development Board and has introduced Workforce Central to additional expertise. Stacey has also helped grow the working relationship between Greater South Wood County and Milwaukee. The two sites now talk on a monthly basis with each other and Stacey about how they can work together to advocate for state level changes in workforce development policy that will improve conditions in urban and rural areas.

Policy Work

In addition to the policy work being undertaken in conjunction with the Milwaukee site, Workforce Central is pursuing changes in policy related to Food Stamp Employment and Training. The Funders' Collaborative has benefited from the expertise of the Aspen Institute, the Voinovich School at Ohio University, and Yellow Wood. NFWS has provided technical assistance in helping Workforce Central engage Jeff Jablow, a national expert in Food Stamp Employment and Training (FSET), a federal allocation to Wisconsin that can provide funds to assist people who qualify for Food Stamps in gaining skills and employment. Restrictions have been in place in Wisconsin that have created barriers to accessing these federal funds at the local level. Milwaukee was granted an exception to this restriction allowing use of private dollars for drawdown. Jennifer is currently working with State Senator Julie Lassa, Mid-State Technical College, and Wood County Social Services to encourage the Wisconsin Department of Human Services to loosen restrictions, with the hope that new restrictions would be in place for 2011. Jeff Jablow is working with the Casey Foundation nationally and worked with Jennifer, John Chrest and Vickie Lock over the summer on these issues. Jeff has helped to identify solutions that also encourage the state's cooperation. If this results in Wood County Social Services being allowed to maximize this funding source and provide additional work readiness resources in South Wood County, this will be an example of using the Funders' philanthropic investment to leverage additional funds. According to Jennifer Riegenbach, access to this range of expertise has been as important as the funding in helping develop and implement a promising workforce development strategy for Greater South Wood County.

Policy engagement is coming through participation on regional and statewide committees. Jennifer and Workforce Central Advisor Pam Ross (ODC) have been asked to participate on the state-wide

transitional jobs committee. The Department of Children and Families successfully gained a line item in the 2010 budget to launch a Transitional Jobs (TJ) pilot. This work will be modeled after a successful TJ Program in Milwaukee, the New Hope project. This project focuses on non-custodial parents struggling with jobs. The state recognizes the need to pilot this program outside of southeastern Wisconsin so it may be possible to have some sort of pilot in the South Wood County area. Workforce Central is the only participant in these statewide conversations representing the rural perspective.

Kelly Lucas and Kathryn Dunn, Chair of Milwaukee Area Funders' Alliance, have gone together to meet with the Secretaries of the Departments of Administration, Workforce Development, Children and Families, Health Services and Commerce. Workforce Central is engaged with Milwaukee in conversations at the state level related to potential changes in policy needed to adopt a benefits bank model that would make it easier for workers to access a full range of state and federal tax breaks. They have jointly released an RFP to hire a consultant to understand the options with respect to benefit screening tools.

Research

Workforce Central has been systematic about researching best practices models to address needs in South Wood County. The West Central Initiative Workforce 2020 model has become the template for employer engagement. Similar work will be done in Year 2 to identify best practices for coordinating support services. If models are identified, service providers will be invited to visit model sites, similar to the approach Workforce Central has successfully used with employers.

Workforce Central is also researching the Ohio Benefit Bank model, among others, to increase access to federal and state benefits and tax credits. Through this program, an individual completes one extensive form to obtain access for up to 28 tax credits. It is important to raise the level of awareness and access to benefits and tax credits as part of a barrier reduction strategy that seeks to improve individual and family financial stability. 2007 estimates for Wisconsin indicate that approximately \$600 million is unclaimed; approximately \$80 million is available through the Earned Income Tax Credit (EITC). Changes will be needed at the state level to adopt this model.

The Arkansas Career Pathways Model launched with the Southern Good Faith Fund (SGFF) is also being investigated. Jennifer and a representative of Mid State Technical College participated in a webinar in September to learn more about career ladders and the Arkansas model. Additionally, Jennifer and senior CFGSWC staff and board representatives attended the Council on Foundations Rural Philanthropy Conference in Little Rock, Arkansas, at which SGFF's work was featured in sessions and site visits.

Workforce Central is participating in the Rural Affinity Group. This group is exploring rural models for workforce development and policy implications for doing this work in rural communities. We are interested in NFWS support to further research these issues.

National Level Engagement

ARRA

In concert with the first eight months of Workforce Central, the CFGSWC has invested considerable effort in understanding ARRA and explaining it to the community-at-large. In April,

CFGSWC hired Jason Grey to produce an analysis of ARRA opportunities for Greater South Wood County. In June 2009, Workforce Central and the CFGSWC hosted a panel forum to explain these opportunities to over 100 community members in attendance. After the forum, 60 attendees participated in a workshop facilitated by the Aspen Institute to vet specific ARRA opportunities. In July, a follow-up meeting was hosted to determine the best approach for vetting a potential application to the Green Jobs competitive bidding process.

CFGSWC has been intentional in their overall integrated strategy approach as it applies to ARRA resources. For example, a proposal to ARRA's Strengthening Communities Fund would have provided funding to upgrade information technology for area nonprofits – with an emphasis on those providing services to Workforce Central's low-skill, low-income workers. To prepare for this eventuality, Workforce Central Advisors have included questions about information technology needs and capacities in their survey (described below.)

Council on Foundations

Finally, Kelly Lucas, as a representative of the Council on Foundations and through her service on the Community Foundations Leadership Team, has been invited to the White House four times to discuss implementation of ARRA in rural communities, the NFWS project, the emerging concept of 'Impact Communities' and public-philanthropic partnerships. Engagement at this level and across various departments is expected to leverage additional resources to support the systems change strategy of which Workforce Central is a part. In keeping with their integrated, systems approach, CFGSWC is actively seeking funding opportunities and connections for Workforce Central.

Steve Gunderson, CEO and Stephanie Powers, NFWS Philanthropy Director with the Council on Foundations, have both been very valuable in policy advocacy work and in increasing the understanding of the public workforce development system. Steve and Stephanie have both given public presentations in South Wood in the last six months that integrated concepts of workforce (NFWS), public – philanthropic partnerships and the importance of policy advocacy.

Project Goals, Indicators and Measures

Through the You Get What You Measure® process, Advisors, staff, and several funders identified the following near term goal for Workforce Central:

In our community, advanced manufacturing businesses employ qualified workers in jobs that support families.

The goal underscores geographic focus (in our community), sector focus (advanced manufacturing), and speaks to the gap between existing worker qualifications and qualifications needed to get and keep workers in jobs that support families. While advanced manufacturing is the entry point for Workforce Central's work with employers and provides focus for direct work with employers for the first two years, other types of employers are anticipated to benefit as additional elements of the Workforce Central strategy are implemented through the Workforce Partnership Fund.

Advanced manufacturing is defined by Workforce Central to include manufacturing businesses that create advanced products, use advanced processes, utilize advanced management strategies and/or create or work with advanced materials. Advanced products are defined as innovative products to meet emerging market demand. (e.g. windmill blades). Advanced processes include

processes that simplify work, measure performance, take action, foster responsibility, commit to training and are green (e.g. lean process manufacturing). Advanced management includes teams, learning organizations, cross-training, critical thinking and green business practices. Advanced materials include composites, new chemicals, green technology products and bio-tech.

Participants in You Get What You Measure®, which included service provider members of the Advisory Council, members of the Funders Collaborative, and Foundation staff worked together to identify three key leverage indicators for positive change. An indicator is something that must change to show that significant progress is being made toward the goal. Indicators are framed as “more of,” “less of,” or “presence or absence of.” A key leverage indicator is an indicator that drives the entire system of inter-related indicators toward the goal.

The three key leverage indicators to achieve the goal **In our community, advanced manufacturing businesses employ qualified workers in jobs that support families** were identified as:

- 1. More understanding of employer workforce needs.**
- 2. Workers are able to get to training – reduce barriers to training.**
- 3. Workers are able to maintain employment over time – reduce barriers to employment.**

Workforce Central is developing an action and evaluation plan related to each of the three key leverage indicators.

Key Leverage Indicator #1: More understanding of employer workforce needs.

The key terms in this indicator were defined through You Get What You Measure® as follows:

Employer means advanced manufacturer (as defined above).

Employer workforce needs means: 1) need for specific skills to fill a skill gap, 2) how to address regulatory barriers – internal and external, 3) how to assess current and future workforce training needs, 4) the industry’s best practice (e.g. lean manufacturing) and related training needed specific to your business, departments and plant, 5) how to obtain targeted training delivery, 6) how and how much to invest in training practices, and 7) how adults learn (teaching employers how adults learn).

Work on this key leverage indicator began in December 2008 with a CFGSWC-sponsored Employer Listening Session to introduce area employers to the National Fund for Workforce Solutions project. Stacey Wagner and John Molinaro discussed the NFWS model, rural workforce development strategies and the experience of West Central Minnesota’s Workforce 2020 project. Through this presentation, the interest of manufacturing employers in Workforce 2020 was piqued. After the presentation they spent a considerable amount of time in discussion with John Molinaro, expressing interest in learning more about the model.

The West Central Initiative has developed a strategic workforce assessment model called Workforce 2020 that incorporates Toyota problem solving and other innovative training for employers and their employees. Training needs are assessed by Bill Martinson, Business Specialist with Enterprise Minnesota, the state’s Manufacturing Extension program. West Central Initiative provides grants to employers to cover most of the cost of training. Companies contribute to a portion of the cost of training, pay wages and sign a service agreement that describes the scope of services, expected

benefits, schedule, investment, and requires their participation in survey and evaluation processes. Most training is provided by specialized trainers not available in the region. Since its inception in 1992, Workforce 2020 has served more than 9,000 workers. Among 30 firms receiving services from Workforce 2020 between July 2007 and June 2008, sales increased by more than \$15 million, cost savings were more than \$4.5 million, investments in workforce practices were over \$100,000, 408 jobs were retained and 582 jobs were created. Participating companies have experienced turnover that is approximately half that in non-participating companies, resulting in significant savings in recruitment and training.

In addition, West Central Initiative facilitates, administers, and financially supports a Labor Force Development Council (Peer Council) which is a voluntary association composed of funders, leaders from business and industry, K-12 education, colleges and universities, economic development, government, jobs and training, labor and other organizations with a critical interest in assuring a sufficient supply of skilled labor for the region.

The Minnesota model has proven inspirational for Wisconsin employers. Based on their exposure during the listening session, four advanced manufacturing employers from Greater South Wood County joined Workforce Central staff, Community Foundation of Greater South Wood County staff, the North Central Wisconsin Workforce Development Board (as a representative of the Funders' Council), Heart of Wisconsin Business and Economic Alliance (as a representative of the Advisors) and Mid-State Technical College (as a representative of the Advisors) in making a site visit to West Central Minnesota in July 2009. The site visit resulted in a commitment by employers to support and participate in a pilot program through Workforce Central that will provide insights into developing parameters for an official local launch.

In his visit in December 2008, John Molinaro noted that there was no one involved with Workforce Central at that time with the skill, reputation, knowledge and connections to local businesses to play the role Bill Martinson plays in Minnesota. This was reinforced by the site visit in July. To address this gap, Workforce Central staff asked employers who they thought could play that role. Employers identified John Bergin, a former paper company employee, as the person they would want to see in Bill's role in South Wood County. Workforce Central approached John who, in turn, took time to interview each participating employer to determine what they were looking for and whether or not he felt he could meet their expectations. After thoughtful consideration, John has agreed to be the Workforce Central employer liaison. Bill Martinson has agreed and received permission from Minnesota's Manufacturing Extension Center to share information, protocols, and advice and will help build relationships with Wisconsin's Manufacturing Extension Center. One of the differences between Workforce 2020 and Workforce Central's employer training initiative is expected to be identification and use of qualified local as well as out of region trainers.

Work with employers will begin in October and November 2009 and will include a baseline interview that will be used for evaluative purposes. The interview schedule is currently under development. John Bergin will act as facilitator to assess worker needs for the next six months, with the plan to fully launch this Fund in early 2010. In addition, John and the pilot businesses will establish and grow a manufacturing peer council, similar to what was observed in Minnesota. The peer council will begin with the pilot businesses; they will define what it looks like. In Minnesota, the employers invite other businesses to participate. It is expected that John will play a strong role with the businesses through direct outreach, as well as connect the peer council to the Funders and the Funders to the peer council. Work with employers will help inform how funding is made and help

inform barrier reduction. The approach Workforce Central is taking to advanced manufacturing employers is intended to create a model for engaging employers in other sectors over time.

Employers have also been engaged in Workforce Central through the ***Wisconsin Rapids Area Human Resources Roundtable*** (HR Roundtable) facilitated by Dale Arendt since January 2008. The purpose of the HR Roundtable is to enhance the human resources management profession in the Wisconsin Rapids area through member education, sharing of experiences, expertise, policies and procedures, networking and fostering better understanding of the composition and functions of various local business entities. A predecessor to the HR Roundtable had been sponsored by Lee Hecht Harrison until 2004 when he moved away from Central Wisconsin. Recognizing the gap this left in the employer community, John Corrigan, Director of Human Resources and Administration at Renaissance Learning, Inc., voluntarily worked to reconstitute this group. Initial funding was provided through grant dollars received by the Heart of Wisconsin Business and Economic Alliance (2007-2008) and then the Workforce Central Funders' Collaborative (2008-2009) agreed to fund the HR Roundtable.

Dale Arendt spent about six months individually interviewing 20-25 HR directors to find out what they wanted the Roundtable to be and accomplish. He learned they did not want to replicate the format of the HR group in Stevens Point that focuses on bringing in speakers. Instead, they wanted a group based on networking and research that would allow the highly skilled HR professionals in the community to mentor and share best practices. In 2007, a six-member steering committee representing the City of Wisconsin Rapids; Mid-State Technical College; Opportunity Development Centers; Renaissance Learning; Schreiber Foods; and the Wisconsin Rapids Public Schools reconstituted the HR Roundtable. Two additional members, Bull's Eye Credit Union and Nekoosa Coated Products, joined the steering committee in 2009. The steering committee meets twice a year to think through the next six months.

The Roundtable meets every other month at the business locations of its members. Ninety minute meetings are followed by optional tours of host businesses. Topics have included: emergency preparedness from the community and business perspectives, health and wellness, new laws and employer impacts, health insurance, and grants related to Workforce Central and the Workforce Investment Board. The focus has not been on workforce training. When the topic of jobs has arisen, it has been in the context of job retention and future layoffs. Participants include representatives from 18-20 companies plus the Workforce Investment Board and others who are not HR professionals. A set of group norms makes the Roundtable a safe place to share and learn.

Dale and Jennifer will be working together over the next six months to explore ways to integrate the HR Roundtable more fully into addressing the goals and key leverage indicators of Workforce Central. For example, this may involve utilizing the Roundtable to assist in expanding the NFWS model into information technology as an occupational sector.

Key Leverage Indicator #2: Workers are able to get to training – reduce barriers to training.

The key terms in this indicator were defined through You Get What You Measure® as follows:

Workers means people who are able to work whether they have a job or not – job seekers, dislocated workers, unemployed and without a job for over a year, high school students, underemployed workers, low income incumbent workers with a job but low earnings and adequate

income incumbent workers – and are willing, able and have the aptitude and interest in working in advanced manufacturing settings and other employment sectors as addressed over time by Workforce Central.

Workers are living in or willing to live within 50 miles of Wisconsin Rapids which is the lived region.

Training means assessment and skills development in the South Wood County region or on-site.

Barriers means inadequate transportation, inadequate childcare, inability to meet basic needs while in training, inability to pay for training and attitudinal and emotional barriers including fear of coming in for training, too comfortable with current reality and failure to see the changes in the economy/not recognizing the need to upgrade their skills (inaccurate perception of reality).

Trainers and service providers have anecdotal evidence that transportation is a barrier. People report that they want to come for training but can't because of a lack of transportation. Reducing the transportation barrier will mean providing reliable transportation for ongoing training. Given the lack of public transportation, there will be a need for innovative solutions such as assistance in recovering drivers' licenses, programs that enable auto ownership and promotion of alternative modes of transportation. Success will mean that inadequate transportation will no longer be a viable excuse for failing to take advantage of training options. Baseline data on the extent of the need is yet to be collected.

Trainers and service providers recognize a need for flexible child and dependent care including: short term quality childcare, sick child care, dependent care (not just child care) available during non-traditional hours that is affordable and reliable. Baseline data on the extent of the need is yet to be collected. Reducing the childcare and dependent care barrier to training means inadequate childcare and/or dependent care will no longer interfere with workers' ability to take advantage of training options.

Providers of services recognize that many marginally employed people in our community cannot afford to participate in training. The cost of training is one barrier. Another barrier is the cost of meeting basic needs such as housing, food and clothing if they are not employed.

Providers of workforce training currently recognize two key attitudinal/emotional barriers to training: fear and complacency. Workers can be afraid of training because they do not know what to expect and they fear doing poorly and looking stupid. Fears like these make it more difficult to recruit workers for training. Providers have also experienced an attitude of complacency among some workers that leads to avoidance of training opportunities. If fear and complacency can be addressed, more people will proactively seek out training.

Results of the survey described below will inform the Workforce Partnership RFP focused on reducing barriers to training and employment by coordinating support services for workers.

Key Leverage Indicator #3: Workers are able to maintain employment over time – reduce barriers to employment.

Workforce Central recognizes the need to reduce not only barriers to training, but barriers to maintaining employment over time. These barriers include, but are not necessarily limited to, transportation, childcare, and attitudinal adjustments across the system including not only workers by employers, trainers and service providers. Other barriers may include financial literacy, access to training and more.

A subcommittee of Advisors, including CFGSWC staff, worked with Workforce Central staff and Yellow Wood to develop a survey instrument to use with workforce trainers and providers of support services in Greater South Wood County. They also worked together to develop a list of 67 training and support service providers whose work is most closely aligned with the goals of Workforce Central. The list includes public, private, nonprofit, and faith-based initiatives. In addition to Advisors, Workforce Central successfully recruited community volunteers through United Way to carry out the survey. Yellow Wood provided training to Advisors and volunteers who are currently implementing a survey of 67 providers of workforce training and/or support services in Greater South Wood County. The survey is being conducted through one-on-one interviews with results entered into Survey Monkey for analysis. Results of this survey, combined with results of the initial employer survey for the four advanced manufacturing employers that will be participating in the first phase of Workforce Central's service delivery to employers, will provide baseline data on this indicator for evaluative purposes. Yellow Wood will analyze the results of the surveys with input from the surveyors and the Advisors. The information will be used to understand how and to whom services are currently delivered, identify redundancies and gaps in available services, and understand the existing system of relationships (or lack thereof) between and among trainers and providers of support services. It will also map the existing relationships between trainers, service providers and employers. With the results of the survey, Workforce Central will better understand how and where services are "handed off" from one organization to another and where organizations compete for funding. The in-depth one-on-one interviews are also expected to elicit innovative ideas from the ground up regarding how the system could be changed to produce better outcomes. The survey will also provide valuable insight for CFGSWC in their grantmaking and community capacity building strategies, as well as answer questions to help inform a United Way grant.

Baseline data on what workers need to maintain employment over time will initially come through the employer survey and the survey of training providers being conducted by Advisors.

Workforce Central is planning to establish a workforce partnership in 2010 that will connect training and support services through a grantmaking process. Intentional linkages to the Workforce Partnership will be made between the CEO Peer Council, the HR Roundtable and the Incumbent Worker Training Fund. The Workforce Partnership will organize training providers and support service providers. Place-based training providers will be helped to build their capacity for certification and to understand and work with employers while serving a range of workers. Service providers will enhance their capacity for coordination to support workers, training providers, and employers. Workforce Central will continue to organize employers.

Key Strategic Challenges

To date, Workforce Central's thoughtful approach has served them well. Maintaining a balance of thoughtful, inclusive process and targeted, effective actions will continue to be challenging. Three areas that will continue to require thoughtful consideration are: incorporating local innovation; expanding engagement; and processes and staffing.

Incorporating Local Innovation and Overcoming Structural Barriers

Although rural areas are often characterized as conservative, and there are certainly conservative elements in Greater South Wood County, there are also innovators, particularly in the service provider community, with an interest in coming together to address workforce development. Connecting to and raising the visibility of existing innovation in the community can help overcome skepticism and the fear of ideas "from away." It will be challenging to change the culture of service providers and help a broad spectrum of providers understand their role in and contribution to workforce development. Implementing systems change will require removing the silos and restrictions on service providers created by existing systems and funding mechanisms. For example in transportation, ***"This entails coordinating transportation within the community or area to serve all (beyond ADA) those whether funded by municipalities or specific to elderly or disabled or veterans or children that are disabled or go to school or Head Start. There is county transportation and city transportation. Many of these agencies don't work together. There are many agencies. We need to look at the structure and how it's made up and why, so that we don't have 3 busses going to the same place with one person on each. This is all state and federal siloed money."***

As training providers and support service providers increasingly recognize themselves as part of a shared system, one challenge will be to design and implement shared information systems that allow all participants access to real time information on worker needs. Workforce Central will be conducting research into shared data platforms and systems during the next several months in an effort to identify models that work.

Expanding Engagement

People in rural settings often have strong connections to place and to each other. A larger proportion of people have a history together for better or for worse, there is little anonymity, and there are fewer people available to make things work. Therefore, every relationship matters, no matter how difficult it may be. Unlike urban areas, where there may be many choices as to which organizations to engage with, the choices in rural areas are often nonexistent. There is one major player in a given area and the challenge is how to make it work. Fortunately for Workforce Central, CFGSWC is trusted and respected throughout the community, knows the community well, and has the patience needed to engage without alienating.

Workforce Central has been highly successful in engaging funders, advisors, and several advanced manufacturing employers in the planning stages of the work. As funds are distributed and services are provided, funders' engagement will need to be continuously supported. As advisors find their place in the system, some will no doubt receive more immediate financial support than others. Maintaining focus and engagement and a sense of working toward shared goals when resources are not evenly distributed will be a challenge. Keeping employers engaged as services are delivered, maintaining confidentiality, and encouraging them to encourage other employers to become engaged

is the next challenge. Branching out in a thoughtful way from a focus on advanced manufacturing to other employment sectors in the community with different training and workforce development needs will also be a challenge.

Going forward, Workforce Central is exploring approaches such as focus groups to bringing workers and job seekers more directly into the design of systems to eliminate barriers to training and employment. Designing flexible structures that allow ongoing input from workers and job seekers will be a challenge. There will be an ongoing need to continue to deepen the relationship with the Workforce Investment Board, Mid State Technical College, and Heart of Wisconsin Business Alliance and work toward shared understanding and implementation of an effective dual-focused workforce development strategy. Workforce Central will continue to broaden the base of engaged organizations that have not here to for worked in close coordination.

One partner that is not yet at the table is organized labor. The union environment in South Wood County has not evolved to the point where labor is thinking proactively about their role in the success of a business. The Labor Employment and Training Center (LETC) is represented on the Advisors. LETC is the organization that receives all WIA Dislocated Worker funding. Despite having “labor” in its title, LETC does not currently have the mechanism to support local labor unions in understanding their roles and responsibilities to value skill upgrades in negotiations. It remains to be seen how Workforce Central will be able to engage unions productively over time.

Process and Staffing

There is an interesting reciprocal relationship at work between Workforce Central and the CFGSWC in which Workforce Central informs the Foundation and its staff with respect to workforce development while being informed, in turn about philanthropy and the role of community foundations at the local, state, and national levels. Technical assistance brought in to help Workforce Central benefits the Foundation and vice versa. For example, Yellow Wood is introducing a new approach to outcome funding to the Funders’ Collaborative that may prove instructive for the Foundation in its own discretionary grantmaking and for individual funders in their own work. Likewise, the Foundation has provided Workforce Central with the opportunity to learn about national models related to various aspects of workforce development and be represented in national conversations about rural philanthropy and public private partnerships. It will be important to continue to identify and create opportunities for shared learning and professional development that impose minimal additional burdens such as reporting requirements on existing staff.

Once evaluation baselines are established, it will be important to determine appropriate time lines for re-measuring progress with respect to each of the three key leverage indicators.

As Workforce Central continues to evolve, how it is staffed will need to evolve as well. In the planning stages, a great deal has been accomplished first by Kelly Lucas and CFGSWC, and then by Jennifer Riegenbach with input from outside consultants. As implementation proceeds, there will likely be a need for additional staff to focus on coordinating service providers and training provision for additional sectors and reshaping the systems in which trainers and service providers work with employers. In addition, it will become increasingly important to address the issue of sustainability for Workforce Central. This will require additional staff support to allow the Director to be responsible for strategy and organizational advancement including fundraising and leveraging resources.

Appendices

Jennifer Riggerbach CV
Workforce Central Overview
Process of a Learning Evaluation
Evaluation Table
Trainer and Service Provider Survey
Draft Employer Survey

Appendices

Appendix A: Jennifer Riegenbach CV

Appendix B: Workforce Central Overview

Appendix C: Process of a Learning Evaluation

Appendix D: Evaluation Table

Appendix E: Trainer and Service Provider Survey

Appendix F: Draft Employer Survey

Appendix A: Jennifer Rigggenbach CV

Jennifer F. Rigggenbach

(715) 570-1469 | jrigggenbach@cfswc.org

EXPERIENCE

Community Foundation of Greater South Wood County | Workforce Central | Wisconsin Rapids, WI

Program Director

February 2009-Present

- Manage the day-to-day operations of the National Fund for Workforce Solutions Site, Workforce Central, including management of consultants and staff and coordination with local and national evaluation teams.
- Staff the Workforce Central Funders Council in determining investment strategies; educating members of the Funders Council on Workforce Development and the NFWS strategy.
- Convene the Workforce Central Advisors in development of investment recommendations for the Funders Council, educate the Advisors on Workforce Development and the NFWS strategy.
- Oversee the activities of the Employer Engagement Strategy
- Educate the broader community on the efforts of Workforce Central and a new approach to a dual customer model of workforce development.
- Partner with local, state and national policy advocates to implement local solutions to workforce development issues.
- Pursue collaborative funding opportunities to the benefit of greater south Wood County and the goals of the NFWS.

University of Wisconsin-Milwaukee | Center for Workforce Development | Milwaukee, WI

Assistant Director

June 2002-February 2009

- Convene local workforce development providers in order to forge synergistic learning collaborations and share best practices.
- Partner with local workforce professionals and academics to design and implement research projects related to local, state, and national workforce development policies.
- Direct the development and delivery of continuing education workshops and seminars for workforce development professionals.
- Pursue collaborative fund development activities in partnership with others in Milwaukee workforce community to support the continuous improvement and skill development of the workforce.
- Contract services to the Milwaukee Area Workforce Investment Board. Services included Staffing the President and CEO on two regional initiatives; The Milwaukee Area Regional Workforce Funding Alliance and the Regional Workforce Alliance WIRED Data Taskforce and Implementing the initiatives identified and prioritized by members of the WIB Board of Directors.

CURRENT BOARDS AND COMMITTEES

North Central Wisconsin Workforce Development Board Strategies Committee

Member

WI Department of Children and Families Transitional Jobs Program Planning Committee

Member

PAPERS AND PUBLICATIONS

Milwaukee Workforce Development Landscape Report, UWM Center for Workforce Development, submitted to the Wisconsin Council on Workforce Investment, January 2006.

The University as Workforce Intermediary: UWM's Center for Workforce Development (with Dr. Sammis White), Council on Adult and Experiential Learning, 2006.

EDUCATION

UW - Milwaukee | Master's Degree Program – Cultural Foundations of Education | courses

UW - Milwaukee | Bachelor's Degree – Educational Policy and Community Studies | May 2001

Appendix B: Workforce Central Overview



Workforce Central

Workforce Central, is a community-based, grant-making partnership that invests in creating and sustaining a skilled and highly productive workforce in greater south Wood County, Wisconsin. The project leverages local philanthropy and public workforce resources to achieve its goals.

Workforce Central is one of the first rural sites partnering with **National Fund for Workforce Solutions (NFWS)**. As one of 21 sites nationwide, we are able to leverage not only financial support from NFWS but also access its national workforce expertise and technical assistance.

The Need

- Employers continue to seek a stronger, dependable, job-ready workforce.
- Workers and job seekers want to work and be productive members of the community.
- Employers want to advance business processes that require new skills for current workers.



Funders and Advisors

Workforce Central Funders have pooled \$1.2 million, including the aligned resources of the North Central Wisconsin Workforce Development Board.

Workforce Central Advisors provide expertise in adult education and training, career development, support services, labor issues, and community economic development. They support and inform the Funders in developing strategy.

Core Goals

- Employers are able to hire and retain local skilled workers at competitive wages.
- All workers have the skills and support they need to successfully participate in a vibrant, local labor market.
- Articulated career pathways exist in industries vital to our region.
- Policies support workforce partnerships, employers, and workers.

Workforce Central Strategy

1. Convene community stakeholders for shared learning and comprehensive planning
2. Fund worker training that will have a direct and sustainable impact on business competitiveness, productivity or employee compensation.
3. Build the capacity of organizations to enhance the local network of services available to workers and job seekers.
4. Advocate for public policies that support workers and employers.



Workforce Central's Rural Workforce Intermediary Model

Workforce Central is committed to building a rural workforce intermediary that will:

- provide businesses with worker training solutions, and
- assist low-skilled and low-wage workers in attaining skills and accessing resources to help earn family supporting wages and grow financial independence.

Worker Training

World-class training that ensures a good fit between the employee and business strategy.

Workforce Partnership Fund

Workers are more productive when they live in communities where they can access support when needed and learn how to manage family financial resources.

Phase I Focus

Advanced Manufacturing businesses are important to the South Wood County community; grants will support:

Projects:

- Industry specific training aligned with business strategy.
- Training must have direct and sustainable impact on productivity, competitiveness, or employee compensation.

Priority Goals:

1. Addresses a regional skill constraint
2. Results in regional competitiveness
3. Maximizes worker productivity and value
4. Results in higher wages

Focus Areas

1. Reducing Barriers to Employment

Strengthen the network of social service, education, and training providers that work to:

- Remove common barriers
- Increase clients' employability and opportunities

2. Building Economic Assets

Create opportunities for families to understand how to better manage and grow their financial resources.

3. Ensuring Career Ladder Opportunities

exist in key industries that are vital to our regional economy.

Contact:

Jennifer Riggensch
Project Director, Workforce Central
478 E Grand Ave
Wisconsin Rapids WI 54494
715.423.3863
jriggensch@cfswc.org
www.cfswc.org



Community Foundation of Greater South Wood County is the coordinating organization for Workforce Central

National Fund for Workforce Solutions
www.nfwsolutions.org

Appendix C: Process of a Learning Evaluation

Yellow Wood Associates Process of a Learning Evaluation

1. Determine the focus of action by discovering the key leverage points that can move the system in question toward the desired goal, and defining those leverage points to make them measurable. Measures are positive behavioral changes that constitute progress toward the goal. Actions are focused on achieving desired changes in measures over time.
2. Use baseline measures to capture initial conditions with respect to process. We capture initial conditions with respect to process through on-site observations and baseline interviews with selected key informants. We are interested in how well the project is understood, the extent to which the understanding is shared, clarity or lack thereof around roles, goals, and process, and degree of engagement. We capture initial conditions because, if the project is successful, we should see increasing clarity and engagement over time.
3. Conduct learning coach interviews with project leaders. We conduct ongoing learning coach interviews with project leaders to assist them in integrating new information as it becomes available and maintaining focus on goals, indicators, and measures.
4. Use baseline measures to capture initial conditions with respect to outcomes and test assumptions about key leverage indicators. We suggest measurement clarifications, develop measurement plans and instruments and support the measurement process based on clients' articulation of key leverage points. The client determines who will provide the data, collect the data, and records the data in preparation for analysis. Data should be as complete as possible and organized for data entry.
5. Analyze and interpret the results of measurement to test assumptions and capture relevant, actionable information about current conditions. We enter the data, analyze the data, and report the data. The data is interpreted through dialogue with the client.
6. Use the results of measurement to make progress toward the goal. We work with the client to discuss ways to use the results of measurement to make progress toward the goal by educating others, influencing decision-makers, and making actions more effective.
7. Assist in aligning actions to move the measures. We assist clients in framing their actions so that are clearly focused on moving the measures that represent key leverage points for making progress toward their goals.
8. Re-measuring for progress. We refine the measurement process and determine, with the client, the appropriate time frame for re-measurement. Re-measurement should occur after actions have been in place long enough to expect to be able to capture behavioral change.
9. Reports to clients. We prepare brief summary reports to clients after each step of the learning evaluation, e.g. workshops, baseline interviews, etc., so that the learning from each step can be incorporated into project management on an ongoing basis.
10. Reports to clients and funders. We prepare a summary report at time periods stipulated in our contract designed for clients and funders. The initial report is a summary of baseline conditions and progress over the evaluation period in achieving clarity and putting processes in place to move forward. Subsequent reports focus on process and outcomes as evidenced through re-measurement.



Appendix D: Evaluation Table

WORKFORCE CENTRAL GOAL

In our community, advanced manufacturing businesses employ qualified local workers in jobs that support families.

<i>Key Leverage Indicator #1</i> More understanding of employer workforce needs	<i>Key Leverage Indicator #2</i> Workers are able to get to training – reduced barriers to training	<i>Key Leverage Indicator #3</i> Workers are able to maintain employment over time- Reduce barriers to employment
Workforce needs include: filling skills gaps, overcoming internal and external regulatory barriers, understanding how to assess needs, understanding industry best practices in training and training investment, matching workers with training for successful outcomes, understanding how adults learn.	Barriers of concern include: Fear of failure and/or the unknown, complacency (employer survey) – HR Roundtable is best group for employer survey. Reliable transportation, and childcare (service provider survey)	Barriers can include reliable transportation and childcare, What about other barriers? The list of barriers in the survey is longer than this. Add other barriers here. Employers understand and implement changes that lead workers in advanced manufacturing firms to remain with their employers for longer periods. Changes include improved training and career ladders.
Measure 1: Number of businesses referring clients to services to assist with barrier reduction. Number of clients referred. Measure 2: Number of businesses taking advantage of training. Number of workers trained Measure 3: The number of advanced manufacturing employers that improve their understanding of workforce needs as evidenced by changed behavior.	Measure 1: the array of services available to workers that address barriers to training (service provider survey) Measure 2: number of individuals seeking training & receiving services. (service provider survey) Measure 3: The number of workers that receive training relevant to jobs in advanced manufacturing businesses.(employers)	Measure 1: The array of services available to assist workers in maintaining employment over time. Measure 2: Number of workers accessing services. Measure 3: Average retention time of employees in advanced manufacturing firms.
Baseline measures will be established through targeted interviews with advanced manufacturing employers that want to engage with Workforce Central and of service providers.	Baseline measures will be established through targeted interviews of service providers and advanced manufacturing employers	Baseline measure of retention (turnover) will be established with participating employers.
Funders' Council will develop outcome-based RFP targeted to meeting employer needs, including increasing availability of relevant training and employee participation.	Workforce Central Advisors undertaking Survey to understand what services are available and what gaps in services are perceived – Also to understand how many people and what types of people are using these services to what end – and how many people have completed job-related training and placement in advanced manufacturing. Funders' Council will develop outcome-based RFP targeted to reducing barriers, related to job seekers and incumbent workers in advanced manufacturing and other areas	Workforce Central Advisors undertaking Survey to understand what services are available and what gaps in services are perceived The employer survey should include questions about barriers to worker retention.
Actions will be taken by grantees to understand employer's workforce needs and provide training while improving employer understanding of available expertise and services.	Actions will be taken by grantees to reduce barriers and close gaps	Actions to reduce barriers and improve employer understanding of workforce needs will result in greater retention (lower worker turnover) in targeted firms
Re-measure will occur at the end of twelve months of intervention by Workforce Central (12 months after grants are awarded).	Re-measure will occur at the end of twelve months of intervention by Workforce Central (12 months after grants are awarded).	Re-measure will occur at the end of twelve months of intervention by Workforce Central (12 months after grants are awarded). Note: turnover may increase before it decreases if workplace culture changes.

Appendix E: Trainer and Service Provider Survey

Workforce Central Interview Schedule

September 18, 2009

My name is _____. I'm contacting you on behalf of Workforce Central, which is an initiative sponsored by the Community Foundation of Greater South Wood County and other funders (see handout). We are committed to improving employment opportunities in our community by supporting both employers and workers/job seekers. The goal we are focused on is, "In our community, businesses employ qualified local workers in jobs that support families." To get there, we know barriers to worker training must be reduced. These include basic skills training, child care issues, transportation, financial literacy, AODA (Alcohol and Other Drug Abuse), legal issues and cultural or language barriers. Also, opportunities like industry specific training and apprenticeships must increase.

We want to understand what the various organizations in our community are already doing that is relevant to workforce development. We would like to ask you some questions to help us understand better what kind of services you provide.

Your answers will be used to inform a community-wide strategy geared at supporting workers in employment. Your responses will be confidential, only reported in the aggregate, not by individual organization. We would be happy to share a summary of the results of our research with you. We invite you to join with us in working toward the goal we and others have defined for our community.

Information to be filled out ahead of the interview if at all possible:

Organization Name:

Executive Director (name, email, phone):

Other Contact Name (name, email, phone):

Type of organization:

- | | |
|---|---|
| <input type="radio"/> Non-profit | <input type="radio"/> Governmental Agency |
| <input type="radio"/> For-Profit | <input type="radio"/> Educational Institution |
| <input type="radio"/> Faith-Based Volunteer group | <input type="radio"/> Other- Please describe |

List Program, if applicable:

Interviewee Comments:

Interviewer Comments:

Questions to ask in the interview:

I'd like to talk with you about your organization, its mission, populations it serves, etc.

1. What is your organization's mission? (This might also be possible to find prior to the interview by looking at their website, if they have one, but it may not hurt to ask the question anyway.)

Interviewee Comments:

Interviewer Comments:

2. Does your organization serve specific populations?
 - Yes
 - No

3. Does your funding restrict you to serving specific populations in any way?
 - Yes
 - No

What populations does your organization serve? (Interviewer checks all that apply. Interviewer can use the list below as probes with interviewee.)

- Families
- Children
- Only men
- Only women
- Youth please indicate age-range
- Adults over 18
- Seniors please indicate age-range
- Individuals with disabilities
- Non-custodial parents
- Hmong
- Hispanic
- Native American
- Ex-offenders
- Incarcerated
- Employers
- Only members
- Other (list): _____

Interviewee Comments:

Interviewer Comments:

Job seekers and workers often face barriers to accessing needed training as well as barriers to maintaining employment. Some examples of barriers are listed in Questions 4, 5 and 6. Next, I'd like to ask you a few questions about the barriers with which you're assisting clients.

4. Is your organization currently assisting clients with barriers to getting and/or keeping jobs? (directly, not by referral)
- Yes
 - No
- a. (If yes) With what barriers are you providing assistance? (Interviewer checks all that apply. Interviewer can use the below list as probes with interviewee.)
- | | |
|---|--|
| <input type="radio"/> Childcare | <input type="radio"/> Financial assistance |
| <input type="radio"/> Dependent Care | <input type="radio"/> Literacy-financial |
| <input type="radio"/> Transportation | <input type="radio"/> Literacy-Technology |
| <input type="radio"/> Meals | <input type="radio"/> Literacy Reading and Writing |
| <input type="radio"/> Clothing | <input type="radio"/> Literacy-ESL |
| <input type="radio"/> Personal essentials | <input type="radio"/> Cultural/language barriers |
| <input type="radio"/> Health/dental/prescription | <input type="radio"/> Work Readiness training |
| <input type="radio"/> Housing | <input type="radio"/> GED/HSED attainment |
| <input type="radio"/> Social/emotional conflicts | <input type="radio"/> Advanced skills training |
| <input type="radio"/> Alcohol and Other Drug Abuse (AODA)
/Mental Health | <input type="radio"/> Interviewing skills |
| <input type="radio"/> Legal such as criminal background, child
support and driving | <input type="radio"/> Job search skills |
| <input type="radio"/> Domestic Violence | <input type="radio"/> Other:
_____ |

4b. Approximately what percentage of your clients receive this service from you? (Ask this question for each checked service.)

Interviewee Comments:

Interviewer Comments:

5. Is your organization currently assisting clients with barriers to accessing further education/training? (directly, not by referral)
- Yes
 - No
 - a. (If yes) With what barriers are you providing assistance? (Interviewer checks all that apply. Interviewer can use the below list as probes with interviewee.)
- Childcare
 - Dependent Care
 - Transportation
 - Meals
 - Clothing
 - Personal essentials
 - Health/dental/prescription
 - Housing
 - Social/emotional conflicts
 - Alcohol and Other Drug Abuse (AODA)/
Mental Health
 - Legal such as criminal background, child
support and driving
 - Domestic Violence
 - Financial assistance
 - Literacy-financial
 - Literacy-Technology
 - Literacy Reading and Writing
 - Literacy-ESL
 - Cultural/language barriers
 - Work Readiness training
 - GED/HSED attainment
 - Advanced skills training
 - Job search skills
 - Interviewing skills
 - Other: _____

5b. Approximately what percentage of your clients receive this service from you? (Ask this question for each checked service.)

Interviewee Comments:

Interviewer Comments:

6. Do you count the number of individuals you serve?
- yes
 - no

(If Yes), what type of information do you collect? (pick up any forms or applications, if possible)

About how many did you serve in the last year?

Interviewee Comments:

Interviewer Comments:

7. Here is a list of organizations that provide services in this area. (Hand it to interviewee.)
- a. Please check off on the form the appropriate box to show:
 - 1. If you've never heard of them.
 - 2. If you've worked with them occasionally.
 - 3. If you've worked with them regularly.
 - b. Are there any organizations not on this list that you do work with?

Interviewee Comments:

Interviewer Comments:

Now, I'd like to talk to you about referrals you might make to other organizations.

8. Does your organization refer clients to other organizations for assistance?
- Yes
 - No

(If yes) What are the organizations and what assistance do they provide? (Interviewer checks all that apply. Interviewer can use the below list as probes with interviewee. Interviewer can put number of organization from separate list below.)

Barrier

- Childcare
- Dependent Care
- Transportation
- Meals

Organization(s)

- Clothing _____
- Personal essentials _____
- Health/dental/prescription _____
- Housing _____
- Social/emotional conflicts _____
- Alcohol and Other Drug Abuse/Mental Health _____
- Legal such as criminal background, child support and driving _____
- Domestic Violence _____
- Financial assistance _____
- Literacy-financial _____
- Literacy-Technology _____
- Literacy Reading and Writing _____
- Literacy-ESL _____
- Cultural/language barriers _____
- Job search skills _____
- Interviewing skills _____
- Work Readiness training _____
- GED/HSED attainment _____
- Advanced skills training _____
- Other: _____

Interviewee Comments:

Interviewer Comments:

9. Are there any barriers to employment and/or training and/or education that are becoming increasingly significant to your clients? If so, what are they?
- Yes
 - No

Interviewee Comments:

Interviewer Comments:

10. What gaps in service do you notice when working with clients on employment or training or education barriers?

Interviewee Comments:

Interviewer Comments:

(The next question is for those organizations that work with employers.)

11. Do you work with employers?

- Yes
 - No
 - a. (If yes) What services are you providing to employers? (Interviewer checks all that apply. Interviewer can use the below list as probes with interviewee. If no, skip to next question.)
- Job posting and recruitment
 - Skills assessments
 - Employment screening
 - Job placement
 - Job coaching/mentoring
 - Employee retention planning
 - Incumbent worker training
 - New worker training
 - Business Training
 - One-on-one business coaching
 - Financial assistance to support training
 - Financial assistance with capital improvements
 - Connection to services for employees such as those listed above in questions 4-6.
 - Other: _____

Interviewee Comments:

Interviewer Comments:

The next set of questions is about your organizational capacity. Answers to these questions will help us to assess the needs of programs in our community.

12. Do you know if your organization or program is currently listed in the 211 database? (bring 211 brochures)

- Yes
- No

Interviewee Comments:

Interviewer Comments:

13. Does your organization have information technology barriers that keep you from effectively providing services? (Interviewer checks all that apply. Interviewer can use the below list as probes with interviewee.)

- Lack of IT Support
- Outdated or incompatible equipment (hardware)
- Inadequate Software
- Lack of trained staff
- Cost
- Other: _____

Interviewee Comments:

Interviewer Comments:

14. Is the annual budget of your organization less than \$500,000? (Only ask if the organization is a nonprofit or faith-based organization)

- yes
- no

Interviewee Comments:

Interviewer Comments:

15. How many staff do you have serving south Wood County? Full-time (40 hours)? Part-time (less than 40 hours?)

Interviewee Comments:

Interviewer Comments:

16. Has your organization had to reduce or add staffing/programs over the past 18 months?

- b. Reduced staffing/programs
- c. Added staffing/programs

16a. (If Yes), how many positions have you lost or added?

Interviewee Comments:

Interviewer Comments:

17. Does your organization have a strategic plan?

- Yes
- No

(If yes), has it been updated in the last three years?

Interviewee Comments:

Interviewer Comments:

18. Do you plan to add or drop any programs or staff over the next two years?

- Yes
- No

Interviewee Comments:

Interviewer Comments:

19. Thank you for taking the time to be interviewed for this survey. Do you have any questions or further comments at this time?

Interviewee Comments:

Interviewer Comments:

20. Would you like to receive a summary of the results of our research?

- Yes
- No

Interviewee Comments:

Interviewer Comments:

(If the interviewer is uncomfortable answering questions from interviewees, have interviewee contact Jennifer Riggerbach at Workforce Central at jriggerbach@cfswc.org or 715-423-3863.)

Can I contact you for further clarification if necessary?

Appendix F: Draft Employer Survey

Workforce Central

Draft Measurement Questions for Firms related to three key leverage indicators

Goal: In our community advanced manufacturing businesses employ qualified local workers in jobs that support families.

1. Indicator: **Reduced barriers to get to training i.e. support, transportation, childcare.**
2. Indicator: **More understanding of employer workforce needs**
3. Indicator: **Reduced barriers to workforce retention**

We are asking you these questions for two important reasons. First, your answers will help us understand how we can best help you. Second, your answers give us a picture of baseline conditions in your firm that will allow both of us to know if our work together makes a difference. Information you provide will be kept confidential unless you give us permission to share it. Neither your name nor the name of your company will appear in reports we submit without your permission. Thank you in advance for your thoughtful and candid responses.

Date:

Name of Firm:

Name of Respondent:

Email:

Phone:

Section One: Employer Experience

1. How many employees do you currently have? Please categorize them into specialized and non-specialized, full-time and part-time.

Specialized - The jobs/skills that are specialized to you as an advanced manufacturer (e.g. engineer, chemist, laboratory technician, etc.).

Non-specialized - The jobs/skills that are necessary to your business but not highly specialized (e.g. accounting, marketing, administrative, non-specialized information technology).

	Specialized	Non-specialized	Total
Full-time (>=30 hrs/wk)			
Part-time (<30 hrs/wk)			
Total			

2. Do you offer training or education to your employees? on-site Yes No offsite Yes No

If you offer offsite training or education, which of the following have you used and how satisfied have you been:

(List options available in and around Wisconsin Rapids with an "other" option.)

(Very satisfied, satisfied, not satisfied) If not satisfied, please explain:

If you offer on-the-job training, do the people in your firm who deliver training in-house have specific expertise in understanding how adults learn?

Yes No

If no, would you be interested in training for your in-house trainers in how adults learn?

Yes No

3. Approximately what percent of overall revenue does your company invest in workforce training in an average year?

Do you know if this is above average, average, or below average for firms in your industry?

Above average

Average

Below average

Don't know

Would you like more information on best practices in training investments for advanced manufacturing firms? Yes No

4. Have you pursued training opportunities for your employees related to best practices in advanced manufacturing such as lean manufacturing, (add here)? Yes No

If yes, what type(s) of training have you pursued?

If no, would you be interested in learning more about these types of training opportunities? Yes No (list here)

5. Have you encountered any regulatory barriers within or outside your business that affect your ability to effectively train your employees? No Yes, please describe:

Internal barriers:

External barriers:

6. As an employer, do you regularly assess the current and future training needs of your workers? Yes No

If yes, how well does your current assessment process work?

Very well, well enough, not very well

If no or not very well, would you be interested in learning more about best practices in employee skills assessment? Yes No

7. What are the major skills areas where additional training will be needed within the next five years?

Section 2: Employee Experience

8. Are your employees free to request any training that is offered, or do you select employees to receive specific training?

Employees can request any training

Employees are selected to receive training

If you select employees to receive training, how satisfied are you with your ability to match employees to training opportunities for successful outcomes?

Very satisfied, somewhat satisfied, not satisfied

9. How many of your employees have taken advantage of the training or education opportunities you offer in the past year? _____

10. Do you have a waiting list of employees seeking training? Yes No

11. Do you provide full or partial tuition reimbursements for off-site employee training or education? Yes No

12. Do you know how many of your employees have taken advantage of training or education opportunities beyond those you offer? No Yes If yes, approximately how many have in the past year?

13. Do you have employees you think could benefit from training or education but do not request it or do not choose to participate when it is offered? Yes No

If yes, what are the reasons you think employees do not seek or participate in training and education opportunities?

- a. transportation issues**
- b. child care issues**
- c. fear of performing poorly or looking stupid in training**
- d. can't afford it**
- e. don't recognize the need for training; complacency**
- f. low self-esteem**
- g. fear of losing their current job**
- h. other:**

Section 3: Employee Retention

14. If an employee joins your firm at the entry level, how many advances in position and salary are they likely to experience before they leave?

None

1

2

3

More than 3

15. What percentage of employees have been with your firm?

Less than 1 year

1-2 years

3-5 years

6-10 years

More than 10 years

16. What is the average employee turnover rate in your firm over the past three years?

17. What are the primary reasons employees leave your firm?

Retire

Take a more advanced position elsewhere in the region*

Take a more advanced position out of the region

Return to school or training full time

Take a similar position elsewhere in the region

Take a similar position out of the region

Stay home with children

Other:

* We define the region as within a 50 mile radius of Wisconsin Rapids

18. What have you considered or tried to improve your employee retention rate and what lessons have you learned?