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MAY 2015

**WORKER TRAINING GRANTS
for
WISCONSIN FINANCIAL SERVICES
AND RELATED OCCUPATIONS**

Award Amount: \$5,000 to \$400,000

Applications must be submitted no later than:
August 20, 2015 @ 11:59 PM CDT

Grant Program Announcement
GPA #FF152FL1



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Department of Workforce Development → Office of Skills Development

WISCONSIN FAST FORWARD PROGRAM

Governor Scott Walker signed 2013 Act 9, also known as Wisconsin Fast Forward, into law in March 2013 with strong bipartisan support from both houses of the Wisconsin legislature. The Wisconsin Fast Forward program provides \$15 million in funding to provide employer-focused worker training grants and created the Office of Skills Development (OSD) at DWD to administer the grant program. The Governor's Budget Bill for the 2015-2017 fiscal biennium proposes an additional \$15 million in funding for the Wisconsin Fast Forward program.

The Office of Skills Development is the point of contact for employers seeking Wisconsin Fast Forward training grants, which are customized to the skill needs of each employer. OSD administers and oversees the grant program through a transparent and accountable process. Additionally, OSD works to encourage the development of innovative solutions at the local and regional level that bring together employers, educators, workforce development entities, and economic development organizations to meet area workforce demands.

To maintain a strong environment for private-sector job creation, Wisconsin must train workers to fill the employment demands of growing and expanding employers. The Wisconsin Fast Forward Program acts as a catalyst, encouraging increased collaboration between Wisconsin's workforce trainers and employers to develop and execute business-led training programs. These training programs are designed to provide sustainable short- and medium-term training and placement of workers in positions which offer trainees long-term professional growth and economic opportunity.

The long-term goal of the Wisconsin Fast Forward training program is to encourage partnerships between employers and local or regional economic development organizations, workforce development boards, post-secondary institutions, and private training providers. It is anticipated that the relationships developed through Wisconsin Fast Forward funded training programs will continue to flourish after the Wisconsin Fast Forward grant has ended.

Department of Workforce Development → Office of Skills Development

GRANT PROGRAM ANNOUNCEMENT (GPA) FOR FINANCIAL SERVICES AND RELATED OCCUPATIONS

Financial services include businesses engaged in banking, insurance, securities dealing, fund management, legal services, accounting and related services, management consultancy, and other professional support services. The financial services sector is vital to Wisconsin's economy and an integral component within each community. A large talent base of financial services workers in Wisconsin helps these institutions remain competitive and adapt to changes in the dynamic financial environment. The finance and insurance sectors employ more than 132,000 workers in Wisconsin, with an anticipated growth rate of 8.6 percent by 2022.¹

Wisconsin is a national leader in insurance. The number of insurance jobs in the state rose 11.1 percent from 2001 through 2010. The state ranks fourth among all states in concentration of insurance employment and is directly responsible for nearly 80,000 jobs. The percentage of Wisconsin workers employed in the insurance industry in 2010 was 3.4 percent. Nationally, the insurance industry employed 2.0 percent of all employees. The average Wisconsin insurance industry wage is \$61,549. Considering the purchasing power of industry wages and the industry's total impact beyond the wages paid to its workers, both directly and indirectly, the Wisconsin insurance industry supported more than 200,000 jobs and \$10 billion of employee wages in the state in 2010.²

Consolidation in the banking industry continues to impact workforce needs. In a lean environment, it is even more critical that workers have the tools and training necessary to keep Wisconsin's banking industry and financial services sector competitive.

Per the Wisconsin Careers Pathways website, financial service occupations cover the following areas: Banking Services; Insurance, Securities, and Investments; Accounting; and Business Finance. For additional information on career pathways in financial services and related occupations, please visit: <https://www.wicareerpathways.org/Students/Clusters/Finance>.

¹ Wisconsin Department of Workforce Development, Office of Economic Advisors

² <http://wihealthplans.org/inner.iml?mdl=news.mdl&NewsID=60>

Grant Program Announcement Summary

OSD provides financial and technical assistance to employers to meet their labor needs in partnership with worker training organizations throughout the state. As the administrator for Wisconsin Fast Forward worker training funds, OSD is responsible for establishing funding priorities, developing application criteria, awarding and disseminating grants, monitoring grant outcomes, and assessing program goals.

Through this Grant Program Announcement (GPA), OSD is seeking grant applications from Wisconsin employers that have a specific workforce need that is not met through another education or training program. The demand should be supported by localized labor market information. The grant funds may not be used to supplant existing, routine business training, but should focus on employers' skill gaps in the occupations identified in this GPA. Eligible projects should demonstrate that funds will help to increase the number of new jobs, reduce layoffs, and/or increase overall employment in the state by increasing worker skills to better match employer needs. The primary products of a grant application should be curriculum development and training delivery.

Funds available through this GPA will enable employers, in partnership with a workforce training provider or providers, to deliver customized training in financial services and related occupations to incumbent workers, new hires, and/or job seekers. These grants provide a flexible funding source to respond to the workforce needs of Wisconsin employers with customized training solutions. OSD will ensure accountability and transparency of outcomes by tracking training completions, job placements, wage increases, and overall return on public investment.

Legislative Authority: Awarding of Wisconsin Fast Forward funding is subject to spending authority for the FY15-FY17 fiscal biennium as defined in Sec. 106.27 of the Wisconsin Statutes.

Administrative Rules: The rules governing the Wisconsin Fast Forward program are included in Chapter DWD 801 which are available on the website: WisconsinFastForward.com.

Targeted Business Size: Any

Type of Trainees: Incumbent Workers, New Hires, Underemployed, and/or Unemployed as defined in Chapter DWD 801 and further defined below:

- Unemployed: Trainee not employed at the time of training.
- Underemployed: Trainee not with employer at the time of training.
- New Hires: Trainee employed at employer after the GPA release date.
- Incumbent Workers: Trainee employed at the employer before the GPA release date.

Duration of Training Courses: Short- to medium-term training with each course or module lasting no longer than 12 months.

Training Project Period: The training project period, including curriculum development, training, pre- and post-training activities, and closeout, can be no longer than 2 years.

Grant Amount: From \$5,000 to \$400,000 per Grantee. Grant and match expenditures must be incurred during the training project period. All eligible grant expenditures will be reimbursed when grant and match expenses are documented by the Grantee and approved by OSD. If awarded, a percentage of the grant may be retained until Grantee is in compliance with all conditions of the grant as stipulated in the contract.

Match/Cost Sharing Requirement: Cash or in-kind match equal to the amount of the grant is required. Letters of commitment from the employers, partners, and/or applicant documenting match will be required in the application.

Description: Applications must include a training plan for incumbent workers, new hires, and/or currently unemployed/underemployed workers. It must also include at least one employer committing to the employment of these workers and/or an incumbent worker wage increase, unless its union contract precludes it from doing so. Training programs for unemployed/underemployed workers must be in response to a documented skilled worker shortage in an employer or consortium of employers. Incumbent worker training programs should demonstrate that they will provide the education and skills determined necessary by the employers to enhance the stability and growth of the business and provide opportunities for income and career growth for trainees.

Successful training applications will be defined by employers and may include partnerships with local or regional economic development organizations, workforce development boards, public or private post-secondary institutions, and/or private training providers. OSD recommends that training focus on skills attainment and certifications. Skills attainment develops skills that directly benefit the workers receiving the training by increasing their mastery of their occupation in their field of employment and/or provide new skills for new product lines or business expansion.

Examples of training include, but are not limited to:

- Credit Analysis
- Compliance
- Customer Relationship Management
- Loan Processing
- Financial Support Services
- Financial Advising
- Lending
- Claims Processing
- Personal Banking

Application Forms, Instructions, Checklists, and Process: Applications must be submitted online. You can access the online application, along with the application instructions, related guidelines, and checklists at: WisconsinFastForward.com.

Opportunity Category: Competitive

Important Dates:

Grant Application Training Webinars: **see WisconsinFastForward.com for dates**

Grant Application Due Date: **August 20, 2015 (11:59 PM CDT)**

Anticipated "Intent to Award" Announcements: **Within 60 days from Grant Application due date**

Eligibility: Each application must include an employer and training for individuals in financial services and related occupations. The employer must have at least one Wisconsin location and the trainees will be based out of that Wisconsin location. Applications may include one or more partners, including local or regional economic development organizations, workforce development boards, and post-secondary educational institutions, or private training providers. The applicant may be any one of the above listed organizations in this subsection and must designate a fiscal agent in the application.

Eligible Expenses: Wisconsin Fast Forward funds shall be used for training-related expenses, which may include instructor salaries and fringe benefits, consultant/contractual expenses, training materials, and supplies. See the website for the application instructions, related guidelines, and rules in Chapter DWD 801 for details on eligible expenses.

All expenses must be new and cannot replace existing federal, state, or local government funding. Substituting existing funds with state grant funds will result in additional fiscal monitoring and may result in an audit. Violations of permissible expenses may result in suspension of current or future funds under this program, repayment of monies awarded under this grant, and possible civil and/or criminal penalties.

Ineligible Expenses: Wisconsin Fast Forward funds may not be used for the purchase of real estate or other capital expenses, construction or remodeling, Kindergarten–12th grade education, tuition, or trainees’ wages, stipends, or fringe benefits. See the website for the application instructions, related guidelines, and rules in Chapter DWD 801 for details on ineligible expenses.

Outcomes: The training project should produce quantifiable outcomes and impacts for the employer, training participants, and the State of Wisconsin. Successful training projects will result in training graduates finding or retaining employment, earning higher wages, increasing their skill attainment, and/or receiving industry-recognized credentials. Wisconsin taxpayers should realize higher state revenues from increased individual income and sales tax receipts and increased corporate income and property tax receipts.

The Grantee will be responsible for tracking and monitoring individual workers receiving training under the grant through the completion of pre- and post-training reports and a final report on the net jobs filled by unemployed, underemployed, new hires, and/or incumbent workers and their related wages and/or wage increases. The anticipated result is a skilled workforce that is well-suited for employment and advancement opportunities in Wisconsin.

Components of a Successful Application:

- Grant applications should outline a training program that mitigates an employer’s critical workforce problem, addresses a documented workforce demand, is supported by local, regional, or statewide labor data, and results in training participants finding and retaining employment and/or incumbent workers earning higher wages.
- The application must include an appropriate training provider. Factors to consider in selecting an appropriate training provider include a demonstrated history of:
 - Successful training through its placement, retention, and evaluation rates.
 - Collaboration with the targeted industry in the development of the training program curriculum.
 - Use of current industry standards as the basis for programs utilized to train students in the targeted industry.
- Applicants should consider consulting with local or regional economic or workforce development organizations to assess current skill deficits in the local labor market area, the potential impact of the proposed skill training in alleviating that deficit, and the potential for other employers within the region to benefit from the up-skilled workforce.
- Applicants should also consider inclusion of a performance-based assessment of the trainees’ skills, competencies, and trainability to measure the training impact.
- Applications should include quantitative methods to collect and report data regarding the individuals selected to participate in the training, both pre- and post-training, and the provision of any business information necessary for program evaluation.

Additional Considerations for Projects Focusing on Unemployed or Underemployed Workers:

- Trainee testing and assessment is provided to ensure training and employability plans are in place prior to instruction.
- Instruction is task-specific and designed to prepare the individual for the occupations identified in this GPA in the shortest time possible.
- Instruction is based on job task analysis and is performance-based.
- Specific employers and related available jobs are identified in the application.
- Certificates of proficiency or industry-recognized credentials are provided to all trainees completing training and demonstrating the required competencies.
- The applicant will provide trainee follow-up to determine success and placement after training.
- Provide a clear statement of placement goals that are supported by commitment letters from the employers. In general, OSD recommends that organizations strive for 85 percent placement in unemployed projects when competencies are demonstrated, and pay at least 200 percent of individual federal poverty level (\$11.05) wages. Applications that do not meet these goals should provide support as to why they cannot be met.

Employer Letters of Commitment:

The objective of the Wisconsin Fast Forward program is to hire unemployed/underemployed trainees that demonstrate the required skill set or competency after training, provide new hires a skill set necessary for the job, and/or increase the wages of incumbent workers who acquire additional skill sets. Letters of commitment to hire graduates or raise wages will be required from the participating employers to indicate the extent of job placements or incumbent worker wage increases. The employer's letter should also include commitment to any match funding and/or participation in the planning and implementation of the training program.

Partner Letters of Commitment and Support:

Partner letters of commitment should include attestation regarding match resources that are available to contribute to the project. In addition, employers or partners who are not willing to commit to job placements, wage increases, or match funding, but support the training model, may submit a letter of support for the project.

Grant Scoring and Evaluation:

OSD will rate applications on a 100-point scale, based upon the following point values:

- Project Need (up to 20 points)
- Training Program Design, Cost, and Implementation (up to 25 points)
- Goal and Objectives (up to 20 points)
- Economic Impact (up to 10 points)
- Capacity Building (up to 10 points)
- Economic Opportunity Enhancements (up to 15 points)

OSD will review each application submitted to ensure compliance with application instructions and relevant state and federal regulations. Each grant application must satisfy basic criteria as set out in the application instructions to be considered. All compliant grant applications will be scored. Applicants will be required to attend the Grant Evaluation Committee meeting to allow committee members to ask questions prior to completing their evaluation. In addition to the scores and Evaluation Committee Recommendations, OSD may consider underserved populations, strategic priorities, financial viability, past performance, underserved geographic areas, the potential to replicate the program, and available funding. The applications will be presented to DWD leadership for final review and concurrence. In summary, each grant application will be evaluated on the merits of the training program and the intent to hire graduates, train new hires, or raise the wages of incumbent workers who successfully demonstrate the required competencies.

Post-Award Terms and Conditions/Reporting Requirements:

Grant applications that are funded under this announcement will be required to execute a binding contract with DWD. Grantees will also be required to submit regular project updates with reimbursement requests, documentation of match contributions, progress reports, pre- and post-training reports, and a final project report.

The schedule for reporting will be included in the grant award materials or contract. Please review all grant award special conditions and reporting requirements. In addition to any special conditions described in the award documents and reporting requirements, please note the following:

1. All grant applications funded under this announcement will be subject to program evaluation by OSD. Grantees must comply with all reporting, data collection, and evaluation requirements, as determined by OSD.
2. All grant funds will be reimbursed through an Automatic Clearing House (ACH) payment (direct deposit). ACH payments will be deposited into the grantee's account. To begin receiving ACH payments, you will be required to complete an ACH set-up form which will be provided with your grant award materials. Grant expenditures will be reimbursed at 95 percent of the total amount claimed. After the applicant has achieved their contracted performance objectives, the remaining 5 percent of the grant award will be made available for reimbursement.
3. All grant recipients are subject to audit of related expenditures by DWD staff and/or by an independent certified public accountant acceptable to OSD. Total funding of \$250,000 or more in a round will require an audit from an independent certified public accountant.
4. To the extent feasible and permissible by law, OSD will honor an applicant's request that trade secrets or other confidential information submitted to OSD remain confidential. OSD will treat the information as confidential only if: (i) the information is in fact protected confidential information, such as trade secrets or privileged information; (ii) the information is specifically identified as confidential by the applicant; and (iii) no disclosure of the information is required by law or judicial order. If the application results in a grant, the honoring of confidentiality of identified information shall not limit OSD's right to disclose the details and results of this award to the public.
5. Unless otherwise specified in the contract, the training curriculum developed with Wisconsin Fast Forward grant monies will become the property of the State of Wisconsin.