



→ SKILLED WORKERS. SMART BUSINESS. **STRONG WISCONSIN.**

November 2013

WORKER TRAINING GRANTS
for
CUSTOMER SERVICE
REPRESENTATIVE
TRAINING

Grants of up to \$400,000

Applications must be submitted no later than:
12:00 p.m. December 9, 2013

Grant Program Announcement
GPA #FF134BL1



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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 funding to develop a cutting-edge labor market information system, includes \$15 million to provide employer-focused worker training grants, and enabled the creation of the Office of Skills Development (OSD) at DWD to administer the grant 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 will work 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 businesses.

The Wisconsin Fast Forward Program will act 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 Wisconsin Fast Forward training programs is to encourage partnership between businesses 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.

**Wisconsin Fast Forward
Worker Training Grants for Customer Service Representative Training**

Grant Program Announcement (GPA)

GPA Industry Sector: Various

The Office of Skills Development (OSD) is seeking applications from Wisconsin businesses that are looking to train customer service representatives, either incumbent workers or unemployed and underemployed individuals, with new or expanded skills in basic sales, computer literacy, conflict resolution, and other related proficiencies.

Customer service representatives are an integral component of the Wisconsin workforce and can be found in almost every sector with varying responsibilities and tasks. They may interact with customers, listen to the customer’s needs and concerns, provide information in response to inquiries about products and services, handle and resolve complaints, take orders, determine charges and oversee billing payments, or process returns. They are often the first point of contact with the customer.

Customer service representative jobs are among the highest number of posted job openings on JobCenterofWisconsin.com (JCW). As of the week of October 21, 2013, there were over 2,000 customer service occupation openings posted on JCW and over 3,500 openings posted for sales and related occupations.

Occupational projections prepared by DWD’s Office of Economic Advisors (OEA) indicate that customer service representatives will continue to present attractive job opportunities. The projections show a 15% increase in customer service representative jobs through 2020, with 2,200 job openings expected each year. The average wage for Customer Service Representatives in Wisconsin is \$16.15 per hour.

The following industries employed the most customer service representatives in 2010¹:

Industry Sector	NAICS Code	Percentage
Administrative and support services	56	15%
Retail trade	44-45	11%
Credit intermediation and related activities	52	9%
Wholesale trade	42	8%
Insurance carriers	52	7%

The Occupational Information Network and the U.S. Department of Labor classify Customer Service Representative as an employment classification with a Bright Outlook, which means the classification is expected to grow rapidly in the next several years, will have large numbers of job openings, or are new and emerging occupations.

¹ Bureau of Labor Statistics, Occupational Outlook Handbook (2012)

Grant Announcement Summary

OSD provides financial and technical assistance to businesses 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.

Funds available through this GPA will enable businesses, in partnership with a workforce training provider or providers, to deliver customized training in customer service skills and techniques to incumbent workers and/or job seekers. These grants provide a flexible funding source to respond to the workforce needs of Wisconsin businesses with customized training solutions. OSD will ensure accountability and transparency of outcomes by tracking training completions, job placements, wage increases, promotions, job retention and overall return on investment.

Targeted Business Size: Any

Type of Trainees: Incumbent workers (includes new hires), Underemployed, Unemployed

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.

Funds Allocated to the GPA: Up to \$1,000,000

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.

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

Description: Through this grant announcement, OSD is seeking applications from Wisconsin businesses that have a specific workforce need supported by labor market information that is not met through another education or training program. The grant funds may not be used to supplant existing, routine business training, but should focus on skill gaps in the employer's workforce.

Applications should include a training plan for incumbent workers and/or currently unemployed/underemployed workers. Training programs for unemployed/underemployed workers must be in response to a documented skilled worker shortage in a business or consortium of businesses. Incumbent training programs should demonstrate that they will provide the education and skills determined necessary by the employer(s) to enhance the stability and growth of the business and provide opportunities for income and career growth for trainees.

Successful training applications will be employer-led, and may also 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. 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 customer service training programs include, but are not limited to:

- Identification of the Needs of the Customer
- The Importance of Expectations
- Attitudes
- Communication Skills for Excellent Customer Service
- The Stages of Active Listening
- Questioning Techniques
- Telephone Techniques
- Steps to Resolve Conflict
- Tools for Elimination of Customer Service Problems
- Best Practices in Quality Customer Service
- Measuring Customer Satisfaction and Customer Service Performance
- Effective Management Skills for Quality Customer Service

Application Forms, Instructions, Checklists, and Process: Applications must be submitted online. The application form, instructions, checklists, and process may be accessed via the Wisconsin Fast Forward website: WisconsinFastForward.com and must be submitted no later than 12:00 p.m. December 9, 2013.

Opportunity Category: Competitive

Important Dates:

Application Due Date: December 9, 2013 (12:00 p.m.)

Anticipated Award Announcements: No later than February 10, 2014

Eligibility: Each application must include a business or consortium of businesses with at least one Wisconsin work site. 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 personnel salaries and fringe benefits for instructors or trainers, reasonable travel expenses, consultant/contractual expenses and supplies. See the application and related instructions for specific detail of 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, in-house training facilities, or trainees' wages, stipends or fringe benefits. See the application and related instructions for specific detail of ineligible expenses.

Outcomes: The training project should provide quantifiable outcomes and impacts on the employer, training participants and the state. Successful training projects will result in training graduates finding or retaining employment, earning higher wages, increasing their skill attainment, and/or receiving industry-recognized certificates. 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 closely tracking 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 and/or incumbent workers and related wage increases. The anticipated result is a skilled workforce that is well-suited for employment and advancement opportunities within the Wisconsin business community.

Components of a Successful Application:

- Development of a training program that mitigates an employer's critical workforce problem, fills a documented unmet need, is supported by local, regional, or statewide labor data and results in training participants finding and retaining employment and/or earning higher wages.
- Includes 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.
- Consultation 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 businesses within the region to benefit from the up-skilled workforce.
- At the beginning and conclusion of the training program, a performance-based assessment of the trainees' skills, competencies and trainability to measure the training impact.

- Quantitative method(s) 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 a customer service career in the shortest time possible.
- Instruction is based on job task analysis and is performance-based.
- Specific employers and available jobs are identified prior to instruction.
- Certificates of proficiency or industry-recognized certificates are provided to all trainees completing training.
- The applicant will provide trainee follow-up to determine success after training.
- Provide a clear statement of placement goals. OSD recommends that organizations strive for 85% or higher placement in jobs that pay at least 200% of individual federal poverty level (\$11.05) wages.

Letters of Commitment and Support:

Letters of commitment will be required from the participating business(es) and partners to indicate the extent of match funding and participation in planning and implementation of the training program. Letters should also include an attestation regarding match resources that are available to contribute to the project. Letters of support are also welcome.

Grant Objectives and Scoring:

OSD will rate applications that proceed on a 100 point scale, based upon point values for the selection criteria:

- 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 complete grant applications will be scored and presented to an evaluation committee. In addition to the scores and evaluation committee recommendations, OSD may consider underserved populations, strategic priorities, past performance, underserved geographic areas, potential to replicate the program, and available funding.

The applications will then be presented to DWD leadership for final review and approval. Grants will be funded in the final ranked order until grant funds are exhausted, or all acceptable grants are funded. Availability of funds is no guarantee of approval.

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** payment (direct deposit). ACH payments will be deposited into the grantee's account. To begin receiving ACH payment, 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. All grants of \$250,000 or more 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.