

**COUNTY OF MILWAUKEE**  
INTEROFFICE COMMUNICATION

DATE: March 31, 2014

TO: Supervisor Patricia Jursik, Chair, Economic & Community Development

FROM: Teig Whaley-Smith, Economic Development Director, Department of Administrative Services

SUBJECT: WRTP/Big Step Ready to Work Initiative (File 14-10)

**REQUEST**

There is no request at this time; this report is for informational purposes only.

**BACKGROUND**

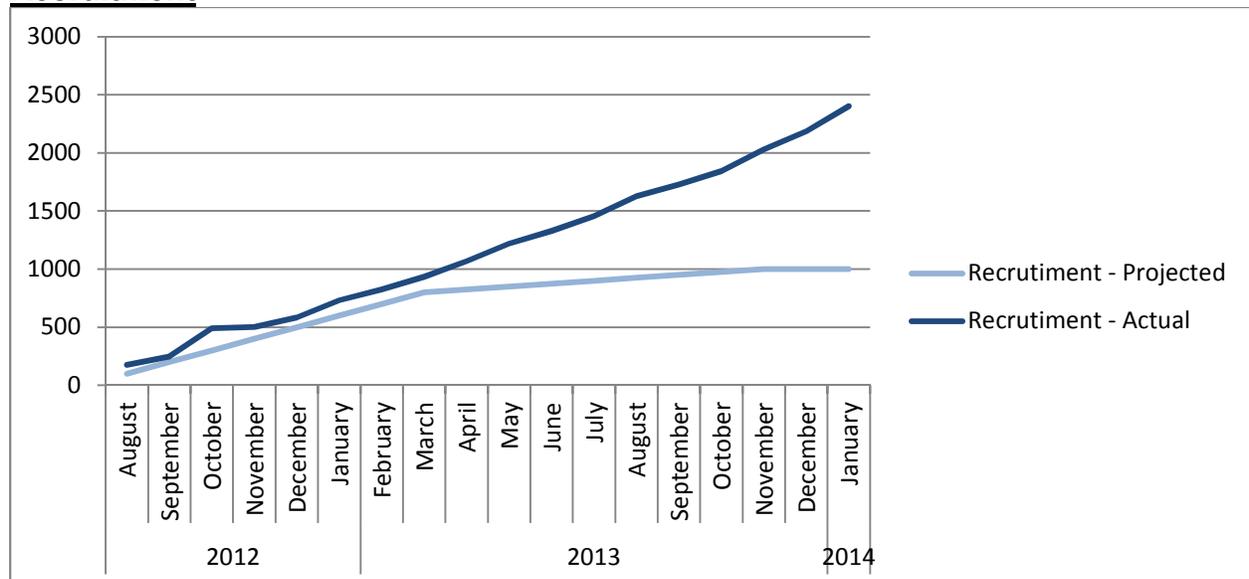
The Ready to Work initiative and partnership with WRTP/Big Step continues to progress in a positive direction.

The audit, program deliverable and narrative reports highlight successes and give assurances that the funds are being used in accordance with the contract.

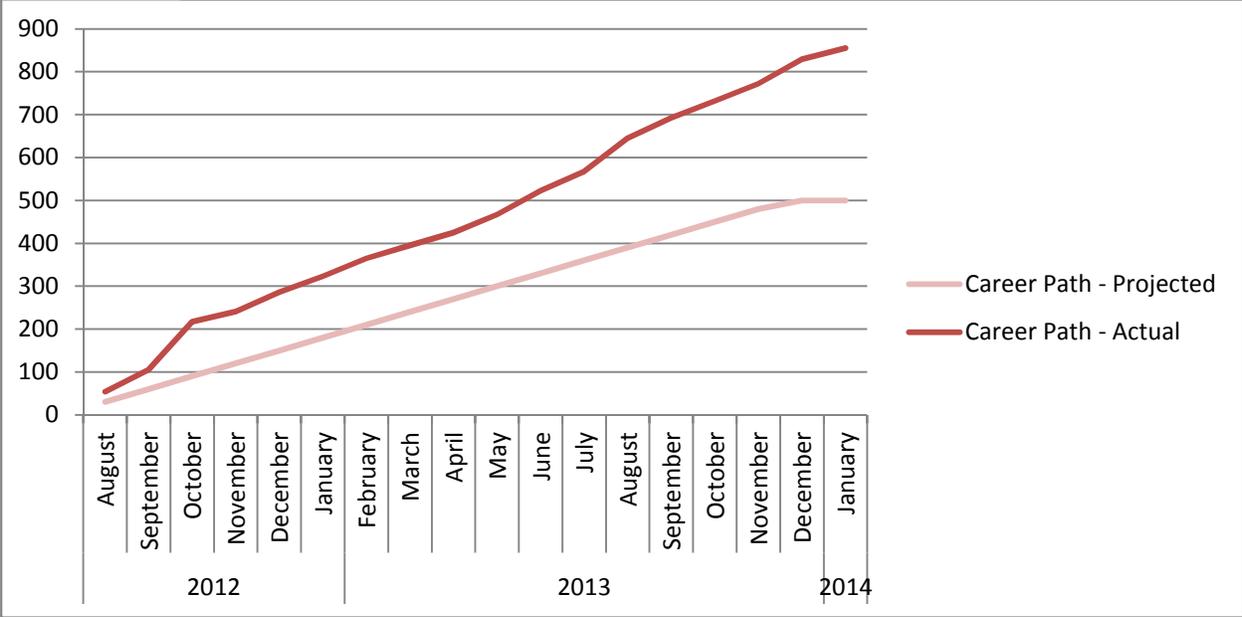
Finally, Economic Development staff continues to be in regular contact and communication with WRTP/Big Step.

Attached are the 5<sup>th</sup> Quarter, and the 6<sup>th</sup> Quarter final report from WRTP/Big Step for the initial Ready to Work investment which ended on January 31, 2014. Economic Development Staff are working with the Work Force Funding Alliance and WRTP/Big Step on the second stage of financing approved by the Board.

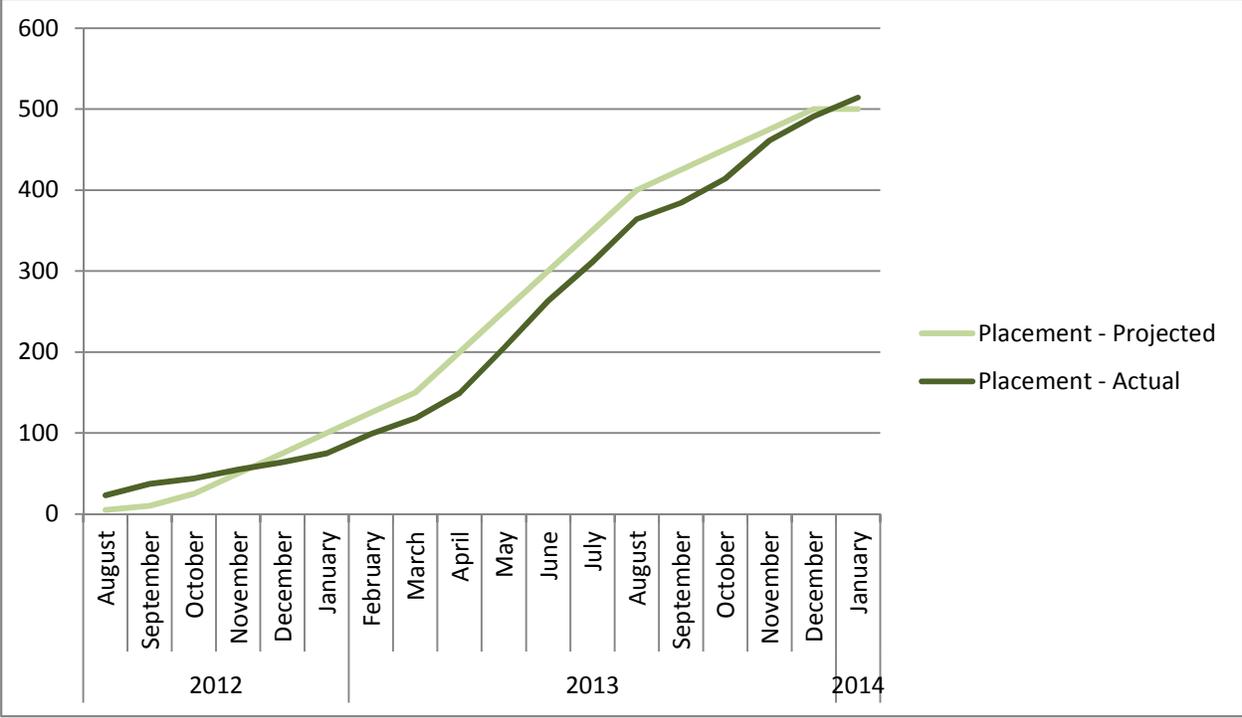
**Recruitment**



**Career Path**



**Placement**



**RECOMMENDATION**

There is no recommendation at this time, this report is for informational purposes only.



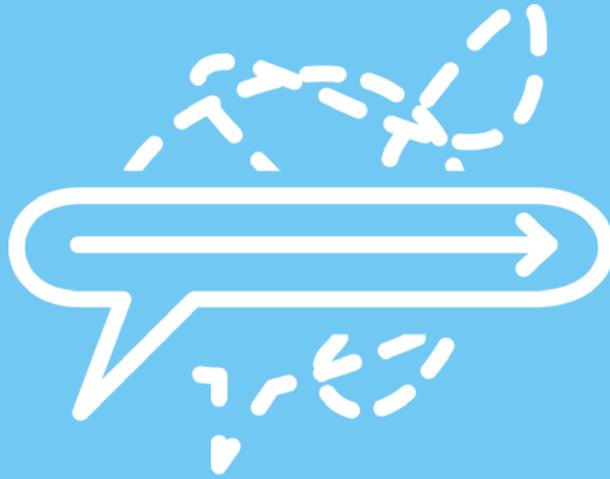
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Teig Whaley-Smith

Economic Development Director, Department of Administrative Services

Attachments

cc: Chris Abele, County Executive  
Marina Dimitrijevic, County Board Chairwoman  
Economic and Community Development Committee Members  
Don Tyler, Director, Department of Administrative Services  
Amber Moreen, Chief of Staff, Office of the County Executive  
Kelly Bablitch, Chief of Staff, County Board of Supervisors  
Raisa Koltun, Director of Legislative Affairs, County Executive's Office  
Julie Esch, Director of Operations, DAS  
Jessica McKnight, Research Analyst, Comptroller's Office  
Jill Suurmeyer, Research Analyst, Comptroller's Office



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## **WRTP/BIG STEP**

**Quarterly Reporting Framework for the Ready to Work Program**

**November 27, 2013**

Prepared By:  
**Christine Smith, Principal**  
Baker Tilly Virchow Krause, LLP  
Ten Terrace Court  
P.O. Box 7398  
Madison, WI 53707



Candor. Insight. Results.



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tel 608 249 6622  
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November 27, 2013

Mr. Earl Buford  
President/CEO  
3841 W Wisconsin Avenue  
Milwaukee, WI 53208

Dear Mr. Buford:

On December 12, 2012, Baker Tilly Virchow Krause, LLP ("Baker Tilly") was contracted to establish and execute a quarterly reporting framework for the Ready to Work Workforce program. The purpose of the project was to establish a reporting framework to verify the accuracy of quarterly program outcomes and expenditures, and to provide an independent review of the quarterly reports on the Ready to Work Workforce Development program.

Baker Tilly is pleased to present our review of the program's 5<sup>th</sup> Quarter expenditures and participation. Please do not hesitate to contact us with any questions you might have regarding the information contained in this report or the work completed to reach the conclusions set forth.

We are pleased to be working with you throughout this project and appreciate the cooperation of the managers and staff with whom we have worked.

Sincerely,

BAKER TILLY VIRCHOW KRAUSE, LLP

Christine Smith, Principal



## Background and Summary

We have completed our review of the Wisconsin Regional Training Partnership/Building Industry Group Skilled Trades Employment Program’s (“WRTP/ BIG STEP”) Quarter 5 Report of its administration of the Ready to Work Workforce Development program. Consistent with the prior report, the Quarter 5 Report contained both monthly snapshots of financial and program information from August 2013 through October 2013, and a summary of the entire three month period.

Under its contract with Milwaukee County, WRTP/BIG STEP is required to complete quarterly reports throughout the duration of this 18 month program that contain information on the number of people served by the program, the types of services individuals received, and program expenditures, including personnel and program costs. Milwaukee County and WRTP/BIG STEP have jointly created a format for the quarterly reports. WRTP/BIG STEP has contracted with Baker Tilly Virchow Krause, LLP (“Baker Tilly”, “we”, “our”, “us”) as the outside agency to determine whether the quarterly reports are reasonable and accurately reflect the program activities and expenditures.

Based on our review, the Quarter 5 Report contains reasonable and accurate information regarding program expenditures and program participation. Baker Tilly did note one discrepancy from the quarterly report WRTP provided to the County. The report provided to the County stated that there were 29 construction placements in August but based on Baker Tilly’s review, there were actually 28.

## Review of Program Expenditures

Our financial review confirmed that the direct and indirect expenditures were calculated accurately and are reasonable and tied out to WRTP/BIG STEP’s financial statements. As shown in the table below, from August 2013 through October 2013, WRTP/BIG STEP spent a total of \$151,161, including \$126,358 in direct expenditures and \$24,803 in indirect expenditures, to provide career pathway and training services and provide job placement assistance. Expenditures increased during the three month period as program participation increased.

Expenditures for the Ready to Work Workforce Development Program <sup>1</sup>			
	Direct Expenditures	Indirect Expenditures	Total
<b>August 2013</b>	\$ 38,108	\$7,277	\$ 45,385
<b>September 2013</b>	32,978	7,196	40,174
<b>October 2013</b>	55,272	10,330	65,602
<b>Quarter 5 Total</b>	\$126,358	\$24,803	\$151,161
<b>Year-to-Date Total</b>	\$686,201	\$166,797	\$852,998

## Review of Program Participation

WRTP/BIG STEP uses Efforts to Outcomes (ETO)—a system that is used by many non-profits and governments—to record and analyze program participants’ progression through the program. To complete our review and verify the program outcomes reported by WRTP/BIG STEP, we obtained an unmodified extract of the information maintained in ETO for each of the months in the quarter under review. We independently analyzed the unmodified data to verify the accuracy of the program information contained in the monthly detail contained in the Quarter 5 Report, as well as the quarterly summary information.

In addition, this quarter we selected several program participants and verified existence by tracing sample selections to various supporting documents such as the participant intake form, picture identification, birth certificate, social security card and high school diploma. Though the type of supporting documentation varied by sample, Baker Tilly verified sufficient evidence for each sample to become reasonably comfortable that each selected participant was an actual individual involved in the program.

<sup>1</sup> Analyses performed using data provided by WRTP/BIG STEP.

## WRTP Quarterly Reporting Framework for the Ready to Work Program

As shown in the table below, our review confirmed that 389 individuals received recruitment and assessment services from August 2013 through October 2013. We also confirmed that 165 participants were placed in career pathway and training programs during the same period.

<b>Assessment and Training Services Provided to Milwaukee County Residents August 2013 through October 2013<sup>2</sup></b>		
	<b>Quarter 5 Report</b>	<b>Baker Tilly Calculation</b>
<b>Received Recruitment and Assessment</b>	389	389
<b>Career Pathway and Training Services</b>	165	165

A total of 103 participants were placed into employment from August 2013 through October 2013. As noted, our findings differ from the Quarter 5 Report by 1 in the number of Construction job placements in August. Follow up with WRTP indicated that this was a typo. The Baker Tilly calculation is the accurate total. As shown in the table below, we found:

- 54 individuals were placed into construction jobs;
- 36 individuals were placed into manufacturing jobs; and
- 13 individuals were placed into a general labor position.

<b>Number of Milwaukee County Resident Placed into Employment August 2013 through October 2013<sup>3</sup></b>						
	<b>Construction</b>		<b>Manufacturing</b>		<b>Other</b>	
	<b>Quarter 5 Report</b>	<b>Baker Tilly Calculation</b>	<b>Quarter 5 Report</b>	<b>Baker Tilly Calculation</b>	<b>Quarter 5 Report</b>	<b>Baker Tilly Calculation</b>
<b>Full-Time</b>	55	54	36	36	13	13
<b>Part-time or Seasonal</b>	0	0	0	0	0	0
<b>Total</b>	<b>55</b>	<b>54</b>	<b>36</b>	<b>36</b>	<b>13</b>	<b>13</b>

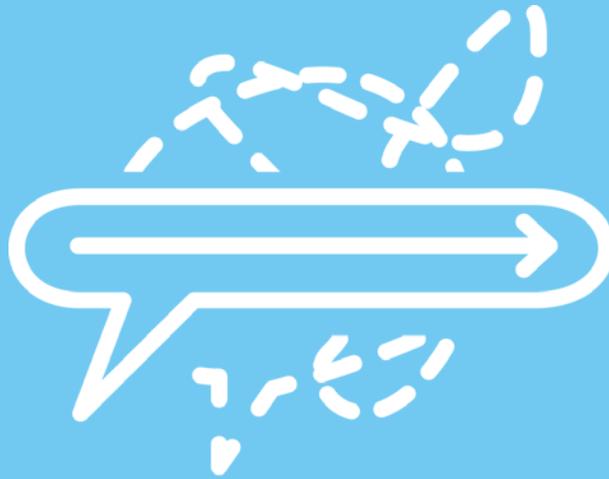
<sup>2</sup> Analyses performed using data provided by WRTP/BIG STEP.

<sup>3</sup> Analyses performed using data provided by WRTP/BIG STEP.

WRTP Quarterly Reporting Framework for the Ready to Work Program

Appendix A – Baker Tilly Review of Monthly Snapshots

August 2013		
Number Placed in Recruitment and Assessment or Career Pathways/Training Services	Quarter 5 Report	Baker Tilly Calculation
Recruitment and Assessment Participants	171	171
Career Pathways/Training Service	78	78
Number Placed in Employment		
Construction		
Full-time Employment	29	28
Part-time Employment	0	0
Manufacturing		
Full-time Employment	22	22
Part-time Employment	0	0
Other		
Full-time Employment	3	3
Part-time Employment	0	0
September 2013		
Number Placed in Recruitment and Assessment or Career Pathways/Training Services	Quarter 5 Report	Baker Tilly Calculation
Recruitment and Assessment Participants	101	101
Career Pathways/Training Service	48	48
Number Placed in Employment		
Construction		
Full-time Employment	9	9
Part-time Employment	0	0
Manufacturing		
Full-time Employment	7	7
Part-time Employment	0	0
Other		
Full-time Employment	4	4
Part-time Employment	0	0
October 2013		
Number Placed in Recruitment and Assessment or Career Pathways/Training Services	Quarter 5 Report	Baker Tilly Calculation
Recruitment and Assessment Participants	117	117
Career Pathways/Training Service	39	39
Number Placed in Employment		
Construction		
Full-time Employment	17	17
Part-time Employment	0	0
Manufacturing		
Full-time Employment	7	7
Part-time Employment	0	0
Other		
Full-time Employment	6	6
Part-time Employment	0	0



Get the straight story.

## **WRTP/BIG STEP**

**Quarterly Reporting Framework for the Ready to Work Program**

**February 28, 2014**

Prepared By:  
**Christine Smith, Principal**  
Baker Tilly Virchow Krause, LLP  
Ten Terrace Court  
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February 28, 2014

Mr. Earl Buford  
President/CEO  
3841 W Wisconsin Avenue  
Milwaukee, WI 53208

Dear Mr. Buford:

On December 12, 2012, Baker Tilly Virchow Krause, LLP ("Baker Tilly") was contracted to establish and execute a quarterly reporting framework for the Ready to Work Workforce program. The purpose of the project was to establish a reporting framework to verify the accuracy of quarterly program outcomes and expenditures, and to provide an independent review of the quarterly reports on the Ready to Work Workforce Development program.

Baker Tilly is pleased to present our review of the program's 6<sup>th</sup> Quarter expenditures and participation. Please do not hesitate to contact us with any questions you might have regarding the information contained in this report or the work completed to reach the conclusions set forth.

It has been our pleasure to work with WRTP and the County on this important project. We appreciate the cooperation of the managers and staff with whom we have worked.

Sincerely,

BAKER TILLY VIRCHOW KRAUSE, LLP

Christine Smith, Principal



## Background and Summary

We have completed our review of the Wisconsin Regional Training Partnership/Building Industry Group Skilled Trades Employment Program’s (“WRTP/ BIG STEP”) Quarter 6 and Final Report of its administration of the Ready to Work Workforce Development program. Consistent with the prior report, the Quarter 6 Report contains both monthly snapshots of financial and program information from November 2013 through January 2014, and a summary of the entire three month period.

Under its contract with Milwaukee County, WRTP/BIG STEP is required to complete quarterly reports throughout the duration of this 18 month program that contain information on the number of people served by the program, the types of services individuals received, and program expenditures, including personnel and program costs. Milwaukee County and WRTP/BIG STEP have jointly created a format for the quarterly reports. WRTP/BIG STEP has contracted with Baker Tilly Virchow Krause, LLP (“Baker Tilly”, “we”, “our”, “us”) as the outside agency to determine whether the quarterly reports are reasonable and accurately reflect the program activities and expenditures.

Based on our review, the Quarter 6 Report contains reasonable and accurate information regarding program expenditures and program participation. Baker Tilly did not note any discrepancies from the quarterly report WRTP provided to the County.

## Review of Program Expenditures

Our financial review confirmed that the direct and indirect expenditures were calculated accurately and are reasonable and tied out to WRTP/BIG STEP’s financial statements. As shown in the table below, from November 2013 through January 2014, WRTP/BIG STEP spent a total of \$163,813 in direct expenses, to provide career pathway and training services and provide job placement assistance. Expenditures increased during the three month period as program participation increased.

Under its contract with Milwaukee County, WRTP/BIG STEP is allowed to charge indirect expenses up to 15% of the total contract award. During the period from November 2013 through January 2014, WRTP/BIG STEP did not charge indirect expenses to the Ready to Work Workforce Development program as a result of exceeding the 15% threshold. While these expenses continued to be incurred, they were covered with funds other than County funds.

Expenditures for the Ready to Work Workforce Development Program <sup>1</sup>			
	Direct Expenditures	Indirect Expenditures	Total
<b>November 2013</b>	\$ 43,712	\$ -	\$ 43,712
<b>December 2013</b>	37,249	-	37,249
<b>January 2014</b>	82,852	-	82,852
<b>Quarter 6 Total</b>	\$163,813	\$ -	\$ 163,813
<b>Final Program Total</b>	\$686,201	\$166,797	\$1,016,811

## Review of Program Participation

WRTP/BIG STEP uses Efforts to Outcomes (ETO)—a system that is used by many non-profits and governments—to record and analyze program participants’ progression through the program. To complete our review and verify the program outcomes reported by WRTP/BIG STEP, we obtained an unmodified extract of the information maintained in ETO for each of the months in the quarter under review. We independently analyzed the unmodified data to verify the accuracy of the program information contained in the monthly detail contained in the Quarter 6 Report, as well as the quarterly summary information.

<sup>1</sup> Analyses performed using data provided by WRTP/BIG STEP.

## WRTP Quarterly Reporting Framework for the Ready to Work Program

As shown in the table below, our review confirmed that 558 individuals received recruitment and assessment services from November 2013 through January 2014. We also confirmed that 123 participants were placed in career pathway and training programs during the same period.

Assessment and Training Services Provided to Milwaukee County Residents November 2013 through January 2014 <sup>2</sup>		
	Quarter 6 Report	Baker Tilly Calculation
<b>Received Recruitment and Assessment</b>	558	558
<b>Career Pathway and Training Services</b>	123	123

As shown in the table below, our review confirmed that 2,512 individuals received recruitment and assessment services over the entire 18 month program. We also confirmed that 855 participants were placed in career pathway and training programs during the same 18 month period.

Assessment and Training Services Provided to Milwaukee County Residents Eighteen Month Total	
	Eighteen Month Total
<b>Received Recruitment and Assessment</b>	2,512
<b>Career Pathway and Training Services</b>	855

A total of 89 participants were placed into employment from November 2013 through January 2014. The total number of job placements was accurately reported. As shown in the table below, we found:

- 32 individuals were placed into construction jobs;
- 46 individuals were placed into manufacturing jobs; and
- 11 individuals were placed into a general labor position.

Number of Milwaukee County Resident Placed into Employment November 2013 through January 2014 <sup>3</sup>						
	Construction		Manufacturing		Other	
	Quarter 6 Report	Baker Tilly Calculation	Quarter 6 Report	Baker Tilly Calculation	Quarter 6 Report	Baker Tilly Calculation
<b>Full-Time</b>	32	32	46	46	11	11
<b>Part-time or Seasonal</b>	0	0	0	0	0	0
<b>Total</b>	<b>32</b>	<b>32</b>	<b>46</b>	<b>46</b>	<b>11</b>	<b>11</b>

A total of 503 participants were placed into employment during the entire 18 month program with an overall average hourly wage of \$15.85. The average hourly wage of these participants over the 18 month program period for construction, manufacturing and other was \$18.94, \$13.26 and \$8.99 respectively.

Number of Milwaukee County Resident Placed into Employment Eighteen Month Total						
	Construction		Manufacturing		Other	
	Eighteen Month Total		Eighteen Month Total		Eighteen Month Total	
<b>Full-Time</b>	236		200		40	
<b>Part-time or Seasonal</b>	8		0		19	
<b>Total</b>	<b>244</b>		<b>200</b>		<b>59</b>	

<sup>2</sup> Analyses performed using data provided by WRTP/BIG STEP.  
<sup>3</sup> Analyses performed using data provided by WRTP/BIG STEP.

Appendix A – Baker Tilly Review of Monthly Snapshots

November 2013		
Number Placed in Recruitment and Assessment or Career Pathways/Training Services	Quarter 6 Report	Baker Tilly Calculation
Recruitment and Assessment Participants	185	185
Career Pathways/Training Service	40	40
Number Placed in Employment		
Construction		
Full-time Employment	19	19
Part-time Employment	0	0
Manufacturing		
Full-time Employment	14	14
Part-time Employment	0	0
Other		
Full-time Employment	4	4
Part-time Employment	0	0
December 2013		
Number Placed in Recruitment and Assessment or Career Pathways/Training Services	Quarter 6 Report	Baker Tilly Calculation
Recruitment and Assessment Participants	156	156
Career Pathways/Training Service	57	57
Number Placed in Employment		
Construction		
Full-time Employment	8	8
Part-time Employment	0	0
Manufacturing		
Full-time Employment	15	15
Part-time Employment	0	0
Other		
Full-time Employment	7	7
Part-time Employment	0	0
January 2014		
Number Placed in Recruitment and Assessment or Career Pathways/Training Services	Quarter 6 Report	Baker Tilly Calculation
Recruitment and Assessment Participants	217	217
Career Pathways/Training Service	26	26
Number Placed in Employment		
Construction		
Full-time Employment	5	5
Part-time Employment	0	0
Manufacturing		
Full-time Employment	17	17
Part-time Employment	0	0
Other		
Full-time Employment	0	0
Part-time Employment	0	0



**Wisconsin Regional Training Partnership (WRTP/BIG STEP)**  
**Quarterly Narrative Report (Q5): August 1, 2013 to October 31, 2013**  
**WRTP/BIG STEP-Milwaukee County Ready to Work Partnership**

## **OVERVIEW AND BACKGROUND**

The **WRTP/BIG STEP** is an innovative and nationally recognized workforce development intermediary. As a nonprofit agency, **WRTP/BIG STEP** has developed comprehensive strategies and programs to prepare and connect unemployed workers and underserved Milwaukee County residents with family supporting careers in the Manufacturing and Construction industries, as well as emerging sectors of the private and public economy. As an intermediary, **WRTP/BIGSTEP** is an integrated funding model leveraging public and private investments and partnerships in meeting the needs of the economy and connecting people with careers.

Working with industry to close the skills gap in workforce development, **WRTP/BIG STEP's Industry led, Worker Centered and Community Focused** approach substantially improves the economic strength of the entire Milwaukee community. As an industry led organization, **WRTP/BIG STEP** works with industry to develop training and employment programs to connect Milwaukee County residents with employment and training opportunities that enhance the competitive position and sustainability of the regional construction and manufacturing industries, as well as the public sector and emerging sectors of the economy. Labor market data and recent news highlight the need to develop a skilled and qualified workforce in a coordinated manner in order to ensure the economic and social viability and vitality of the Milwaukee region.

**The Ready To Work initiative** is a “high road” approach to put real people on real family supporting career pathways by facilitating recruitment, training, direct hire, placement and retention services for Milwaukee County Residents. Complimentary to traditional “jobs programs”, **WRTP/BIG STEP** has developed a flexible and industry responsive model that identifies construction and manufacturing workforce needs first, and then develops strategies and programs to connect Milwaukee County residents with those jobs. This ensures that the training, career pathway programming, and employment support that we provide prepares individuals for placement in pre-targeted jobs upon successful completion of the programs. Our participants are placed in employment through industry designed and credentialed on the job training programs where they learn and earn as they begin their new career pathways.

## **PROGRAM ACTIVITIES**

The Ready to Work program was launched in August of 2012 with the goal of connecting Milwaukee County residents to career pathways and employment. This narrative report covers Quarter Five (Q5) of the partnership. The project is designed to engage industry and develop education and training programs and partnerships that lead to careers and meet the needs of public and private sector employers and emerging needs within Milwaukee County. The Narrative Report is complimentary to Data & Fiscal Reporting providing to Milwaukee County, and highlights work completed in the three areas of the project design – working with industry and Milwaukee County to identify employment opportunities, expanding and enhancing community workforce partnerships, and implementing effective workforce strategies to connect individuals with education, training, and employment.

Prepared on December 4, 2013 By:

WRTP/BIG STEP, 3841 West Wisconsin Avenue, Milwaukee, WI 53208, 414-342-9787, [www.wrtp.org](http://www.wrtp.org)

## **INDUSTRY & MILWAUKEE COUNTY PARTNERSHIP**

### **Construction Program Highlights**

#### *Industry Field Work*

WRTP/BIG STEP industry field work includes networking, organizing and building relationships with employers and labor partners to identify current and projected occupational openings, to discuss and analyze skills, experience, and employment requirements for occupations and classifications, to discuss and develop workforce strategies to meet growth and expansion needs as well as advancement and retention strategies for current workers, and looking at best practices throughout industry to enhance productivity and competitiveness.

As a result of some of our field work, industry staff has been working closely with several unions to collaborate and help identify industry needs and contractor demands, so that contractors are able to continue to successfully bid on projects knowing that they can meet workforce demands. For example, WRTP/BIG STEP collaborated with the Laborers Union Local 113 to help facilitate a confined space awareness course and an asbestos worker certification class. Both of these courses were based on a specific contractor request and allowed the Laborer's Union to help upgrade their current worker's skills for future projects.

WRTP/BIG STEP's work with the Bricklayer's Union to implement workforce strategies and promote green training courses through the GJIF initiative leveraged further positive outcomes that related to upgrading current and incumbent workers.

WRTP/BIG STEP industry staff also hosted the monthly training director meeting with several of the trades represented including: Bricklayers, Carpenters, Electrical, Steamfitters, Painters, Cement Masons, Plumbers and Building Advantage. Several issues discussed included continued outreach efforts, trade awareness days to be held at WRTP/BIG STEP, and the Apprenticeship marketing strategy by Building Advantage and the Building Trades.

In addition to the Joint Director meeting, WRTP/BIG STEP staff attends the Joint Apprenticeship Committee (JAC) and Joint Apprenticeship and Training Committee (JATC) meetings. It is especially important for staff to attend these meetings because we are better able to communicate information on our upcoming training classes and certificates with the industry in an effective manner. This allows for the training classes and tutoring to be customized for the demands of the industry as well as the basic requirements of the industry.

A key reason the JATC's are reaching out to partner with WRTP/BIG STEP on this effort is to ensure that when a candidates applying for an Apprenticeship meet the basic minimum requirements. Expanding workforce development outreach is even more important now since the number of retirees in the skilled trades continues to increase while at the same time, the industry is finally emerging from the recession.

From these conversations, the Apprenticeship Awareness Fair was developed, giving the industry the opportunity to connect and recruit individuals to the workforce. So far, the fair has seen great results, and will continue to be an annual event hosted at WRTP/BIG STEP scheduled in January .

However, more needed to be done, and in talking even further with industry, they identified another way to connect individuals to careers in the trades. Thus, the Apprenticeship Awareness Information Days were born. To date, three trades have taken part in this opportunity, and WRTP/BIG STEP is ready to schedule more dates. The Apprenticeship Awareness Info Days' goals are to educate individuals on:

- What it means to be a construction trades person
- The benefits of careers in the construction industry
- Details of each specific apprenticeship program, and the process to enter
- Different ways in which their apprenticeship programs assist potential recruits

This initiative was developed to give useful and factual information to potential candidates prior to making a decision to apply for an apprenticeship. While emphasizing the very real need to manage the expectations of individuals interested in a skilled trade career, these events also allow the JATC's to work directly with potential WRTP/BIG STEP candidates and learn the high caliber of the potential pool interested in their particular skilled trade.

An added benefit of this effort is that WRTP/BIG STEP is able to feed these candidates into training classes to get them more experience. This will ultimately make potential candidates more qualified, experienced and have more confidence when applying for an apprenticeship. WRTP/ BIG STEP has scheduled OSHA 10 classes, Asbestos Awareness and confined space classes with candidates from the Apprenticeship Awareness Info Days. WRTP/BIG STEP works closely with the City of Milwaukee, the Milwaukee Public School District, the Milwaukee Metropolitan Sewerage District, the Department of Transportation and the housing authority to certify and issue a variety of workforce requirement certificates for the construction industry throughout the region.

Contractors, labor and workers rely on these critical WRTP/BIG STEP services to ensure they are meeting workforce structural requirements throughout the duration of the project. As a result hundreds of individuals are referred to WRTP/BIG STEP to receive the certifications necessary to work on the job. Some of these include Residential Preference Program (RPP), Section 3, Communities in Need (COIN) and others as required on a project by project basis. This work will continue and expand as we begin new projects in development in the Madison community.

WRTP/BIG STEP is in the early phases of a planned statewide construction industry needs assessment that is slated to begin in fall of 2013. The assessment will be in phases and with result expected before the 2014 construction season begins in Wisconsin.

A. Industry Assistance

- a. JAC meetings they are concerned about RPP and meeting those workforce requirements. Our industry coordinator is working to help coordinate this and make sure they really are meeting and prepared to meet these requirements for all the projects currently and in the planning process. We are working to specifically with contractors to identify how the current workforce is designed to ensure they are meeting their requirements on projects and are able to plan to build their workforces to ensure they are able to meet these requirements as all the projects begin to ramp up in 2014.
- b. NML deconstruction starts in December 2013.

B. Workforce Assistance

- a. We are working with Milwaukee County to design a Milwaukee County workforce composition requirements workshop that is geared toward contractors and labor unions. We are facilitating the workshop in the Center of Excellence and reaching out to contractors and labor, so that everyone is understands these requirements.
- b. We are working with several trades on green classes and training to get them back to work because they need more skills to be employable. Also holding OSHA10 classes – We are holding both night and day time classes for both entry level and incumbent workers.

C. Future Workforce

- a. Road building – Classes are booked for classes starting in November. We expect approximately 10 individuals in the class including laid off workers and unemployed new entrants to the construction industry.
- b. Industry led recruitment and strategies – A major construction project led by a healthcare consortium will be starting on a new facility that will be located directly in a blighted Milwaukee community. As a result of the location of the project, the workforce requirements will be in effect including RPP/COIN, Section 3, CDBG and HUD requirements. The developer and healthcare consortium are working in advance with WRTP/BIG STEP staff to design a plan to recruit, train and hire workers for the project directly from the surrounding community. The project itself is not yet approved to move forward, but we are assisting in the planning stages of the project workforce development strategy and will be the primary provider of the recruitment, training, certification and hiring strategy for the workforce needed to complete this project.
- c. New training programs with the Heat and Frost union are in the early development planning phase.

At JATC meetings, questions were posed to industry as to what additional skills are needed to obtain and retain a job in the current job market. As well, we partner with industry to meet the training and certification opportunities for previous graduates that are out of work and qualify, including the City of Milwaukee's Residents Preference Program (RPP), the Milwaukee Public School's COIN certification, the WI DOT TRANS Road-building training, Section 3 certification, and MMSD certification. WRTP/BIG STEP is also working with individual trades to identify green training certificates for apprentices and journey workers.

We are continuing to work as a key strategic partner with the City of Milwaukee, NML and other partners in the design of the workforce requirements around the Lakefront Redesign and the major construction projects surrounding the multi-year plans.

#### *Training and Career Preparation Activities*

Another ELCS-Road Building class is in the planning and recruitment phase and scheduled to begin in on November 5th. We expect this class to include hands on training modules in conjunction with several trades. Our participants will be well prepared for entry into apprenticeship and be better equipped for road building work as it continues to arise.

The WRTP/BIG STEP recruited for two to Entry Level Construction Skills-UnIndentured Electrical Construction Program (ELCS-UECP) training classes to meet the needs of electrical contractors in the southeastern region of the state the classes were run July 30-August 8, and August 7-15.

WRTP/BIG STEP is hosting several monthly OSHA 10 classes for our tutoring candidates as well as incumbent workers to emphasize the importance of safety on the job site.

Bricklayers ran an incumbent worker training in tuck pointing and restoration on August 27. The Bricklayers Union has held several classes in collaboration with WRTP/BIG STEP in September: Fly Ash Class Restoration Training, Air Barrier, and Caulking and Sealants. Providing green training classes will help their current workers be more competitive, current, and prepared for contractors with projects that require this type of specialized certification and training.

#### **Manufacturing Program Highlights**

## *Industry Field Work*

Our outreach continues to local industry employers with a focus on the importance of green manufacturing certifications including HB Performance Systems, Harley Davidson, GE Energy, SpinCraft, Masterlock, Preferred Brush, Miller Brewing, PM Plastics and Masterson. Harley Davidson is in the planning phases of hiring up to 200 workers into their seasonal workforce, and in August agreed to place priority on individuals with Manufacturing Skills Standards Council – Green Production Module (MSSC-GPM) training and certifications.

WRTP/BIG STEP's field work has been targeted strategically to assist the industry with direct employment connection, pre-employment entry-level skills training, and utilization of the IMT Apprenticeship. Assessments are continuing with several employers to determine the viability, likelihood and potential number of employment openings, including the number of individuals who can be put into apprenticeships. Key local companies actively considering utilization of the IMT include HB Performance Systems, Spincraft and Masterlock.

Throughout the process on-going discussions via email, phone and in person contacts and programs designed to succeed are building strong relationships between WRTP/BIG STEP, labor and management in these firms. In addition to the above partnerships and training programs the following is a list of the companies we've worked with and are continuing to work with on workforce development issues:

- a. HB Performance Systems – They have been hiring throughout the fall from our pre-employment training workshops and have scheduled a more formal training for another 12 employees in January 2014.
- b. PM Plastics- *A proposal for training and placement has been approved by PM Plastics and they are asking for resumes and test scores for potential candidates.*
- c. Harley Davidson- *We are working on a pool of candidates for the seasonal workforce hiring process in November through January. HD will hire as many as 200 candidates with a preference in entry level positions given to MSSC-GPM certificate holders and trainees in WRTP/BIG STEP programming.*
- d. Wacker Neuson- *We have received a contract for workforce development with Wacker and are in the process of verifying the numbers and job classifications.*
- e. Advanced Technology International (ATI-Gunstock) – *WRTP/BIG STEP will be their primary training facilitator; they've gone from 40-180 employees in a year and are discussing the potential to add 100 more through us. Also interested in IMT and a pre-employment machine operator training.*
- f. Pure Power Technologies- *Looking for staffing help for 40 new employees considering WRTP/BIG STEP as a training/direct hire partner.*
- g. GE Energy – *We are continuing to work with GE to fill direct hire opportunities and are in ongoing discussions with them around new training opportunities.*
- h. Masterson Company – *Masterson has now hired a total of 17 individuals in two on the job training programs (OJT) that include ELMS, MSSC-GPM and up to 300 hours of training on site at Masterson. The program has been very successful for both the company and the participants and the contract we signed with them has room for another 5 employees to be hired before the end of the calendar year.*
- i. Ocean Spray – *We are working with Ocean Spray to design IMT apprenticeship training programs for over 100 employees in the next year.*
- j. *We are also working with and in discussions with Preferred Brush and Miller Brewing Company around workforce development opportunities.*

### *Training and Career Preparation Activities*

Masterson's first on the job training class continued throughout July. In addition, a new recruitment, orientation, and interviews for another 9 more open positions with Masterson were held July 23-25 and on the job training class began on August 7th with 9 participants. The class will include training on site in WRTP/BIG STEP's Center of Excellence with an Introduction to MSSC-Green Production Module and then continue on the job in Masterson's facility for several months. In addition, the Masterson contract leaves open the potential to hire another 5 candidates throughout the fall should Masterson have open positions.

The Masterson OJT class that began in August will include training on site in WRTP/BIG STEP's Center of Excellence with an Introduction to MSSC-Green Production Module and then continue on the job in Masterson's facility for several months. In addition, the Masterson contract leaves open the potential to hire another 5 candidates throughout the fall should Masterson have open positions.

In August, HB hired another 14 new candidates (some from the June class) into their manufacturing plant out of WRTP/BIG STEP programming. HB is planning to continue to hire entry level candidates off our training lists and has scheduled four more trainings through the fall to include 10-12 participants each month for a total of 40 new hires by January 2014.

### *Orientations, Direct Hire and Recruitment Activities*

WRTP/BIG STEP staff implemented a number of strategies to outreach and recruit candidates for participation in employment and training programs. The primary strategy for recruitment is the General Information Session (GIS) which is coordinated monthly and is open to residents and individual participating in workforce programs through local community organizations and/or the One Stop Job Centers.

Our Resource Information Sessions (RIS) and General Information Sessions (GIS) were held again in August, September and October. The RIS is designed to assist individuals with barriers to program enrollment and employment with referrals to our Community Workforce Partnership.

Manufacturing Direct Hire Sessions, BIG STEP Orientations and Industry Driven recruitments were also held monthly during this quarter.

We have significantly increased the number of students in our Introduction to MSSC Green Production Module tutoring program to engage and prepare more candidates for careers in manufacturing through out Q5.

## **COMMUNITY FOCUSED PIPELINE DEVELOPMENT ACTIVITIES**

### *Youth Workforce Outreach and Coordination*

The WRTP/BIG STEP Pathways to Prosperity Youth Project launched earlier this year. With the assistance of the Greater Milwaukee Foundation, Pathways was able to focus in on work with Milwaukee Public Schools (MPS), helping to provide career exploration and activities to strengthen employability skills for students at the middle and high school levels.

Specifically working in locally strong industries with career opportunities for youth, WRTP/BIG STEP is recruiting and connecting industry and post-secondary partners; providing partnership training for educators and industry professionals; and, assisting with career exploration for young people through work-based learning (WBL). Work

based learning includes job shadowing, industry participation in classrooms, internships, worksite tours, co-op education and youth apprenticeship. WRTP/BIG STEP brings the active involvement of industry and the credibility to convene all necessary partners to build the Pathways to Prosperity model. WRTP/BIG STEP is facilitating intense collaboration between youth, schools, industry and policymakers through the Pathways to Prosperity project.

Work has begun in MPS schools with several programs that include the Tech Terns program highlighted in this Milwaukee Business Journal article: [http://www.bizjournals.com/milwaukee/blog/2013/10/bradley-tech-students-don-hard-hats-at.html?ana=e\\_mil\\_rdup&s=newsletter&ed=2013-10-18](http://www.bizjournals.com/milwaukee/blog/2013/10/bradley-tech-students-don-hard-hats-at.html?ana=e_mil_rdup&s=newsletter&ed=2013-10-18)

The Pathways to Prosperity program in Milwaukee has been successfully launched and is receiving initial praise and excitement in the community: <http://www.bizjournals.com/milwaukee/print-edition/2013/10/11/pathways-program-launching-in-area.html>

### *Pipeline Development*

- We have significantly increased the number of students in our Introduction to MSSC Green Production Module tutoring program to prepare more candidates for careers in manufacturing and the new students are continuing in those tutoring programs. In conjunction with our work with industry raising the profile and importance of MSSC-GPM training in new hires, in August, manufacturing updated its training strategy to improve engagement among participants first entering our programs. All participants are now offered an ELMS1 course that includes an Intro to MSSC-GPM training as soon as their orientations and assessments are completed. By offering the training immediately, we are able to engage more participants and keep them involved on the front end, while having a pool of ready to train/place candidates in specific jobs. With increased industry demands, the strategy is intended to decrease the time it takes to prepare the candidate for open positions. Based on industry feedback requesting that we find ways to decrease the time from selecting candidates to their start date, forty individuals took the ELMS1 course in August and another 20 in September.
- In response to changes in the way our manufacturers are requesting ready to work employment placements, WRTP/BIG STEP made some changes to the delivery of service model for some of our trainings in this industry. We will continue to offer ELMS certifications as well as all the courses included in those certifications. After discussions with several of our major employers, we redesigned the training programs to add flexibility and to increase the numbers of work ready participants in our direct placement pools. In the past, we only held training programs when there was a specific job order for those positions. We have identified no less than 400 open manufacturing positions in the Milwaukee area within the next 6 months and all the employers (PM Plastics, Harley Davidson, HB Performance Systems, ATI, etc) have agreed that they will hire from our direct placement trainees as the positions begin to open. The employers have agreed to place a priority on hiring individuals certified in MSSC-GPM with a second priority on those trained even if they are not fully certified. As a result to these “softer” hiring agreements, we have begun to train larger numbers of individuals in MSSC-GPM with the courses offered immediately upon completion of orientation and assessment activities. By engaging individuals immediately in our programming, participation is increasing, and we are better able to serve each individual’s needs. ELMS essential skills training courses are then offered on a modular/“chunking” basis so participants are able to choose the courses most appropriate to their skills and needs, for example, a blueprint reading course and a basic math course are offered every other week, an individual’s training plan is designed based on each individuals’ goals and appropriate to their needs. An individual may choose to sign up for the blueprint course, the math course or both depending on competency based training plan. In this way, the person testing at 12.9 math level is not required to sit through a basic math course and can instead focus on obtaining the courses that will be most helpful to them in their workforce development pathway. The ELMS courses are all a part of our standard ELMS curriculum and have not been newly created, but instead the delivery method has been slightly

modified, so we believe no course curriculum changes are required. The ELMS training throughout September with an emphasis on MSSC GPM trainings were held throughout September and we expect to begin the new delivery method of training to those completing the green portion of the training beginning in October. Manufacturers will then pull new employees from our pool of individuals who have completed Green and ELMS trainings throughout the fall since they will be well prepared to enter a manufacturer's internal training programs.

- In addition, BIG STEP is increasing the numbers of individuals in our tutoring program to prepare candidates for their trade of interest and help them qualify for the apprenticeship program. This increase in apprenticeship preparation is in direct response to the anticipated increase in need for new apprentices expressed by the trades as a result of the sharp expected increase in demand for construction workers due to several large projects about to begin in the greater Milwaukee area.
- In August, we held Apprenticeship Awareness Days with the Laborers, Carpenters, and Plumbers Unions. BIG STEP Tutoring participants and other community members were invited to learn about each skilled trade from a representative out of the local. Apprenticeship requirements and details about the apprenticeship process as well as an introduction to the various careers and types of work done by each trade were topics covered during the events. In September, the apprenticeship training directors from the Plumbers, Laborers, and Painters unions held Apprenticeship Awareness Information Days to discuss the benefits of union membership, what an apprenticeship is, and what our candidates need to do to be ready for a career in construction. In October, the Plumbers, Painters and Laborers held Apprenticeship Awareness Days.
- WRTP/BIG STEP is also working closely with contractors and various JAC committees to ensure their current RPP and COIN eligible workers are getting certified in anticipation of several new local projects with workforce requirements and also reviewing applicant lists to make certain they have a diverse pipeline of workers prepared to work as new opportunities arise. Coordinating this need in advance with contractors and the JAC's helps to make certain that the local workforce is strong enough to support the anticipated increase in demand for workers.
- We are continuing to work with the JATC's and with individual participants to upgrade skills and certifications. We ran OSHA10 and Asbestos Awareness classes with incumbent workers in August and utilized the contact with participants to offer further mentoring and support to the incumbent workforce. Through the Bricklayer's training courses, we are offering skills upgrades that included in August classes including Caulking and Sealants, Spray foam Air Barrier, Tuck pointing and Restoration, Fluid Applied Air Barrier, and Pervious Concrete
- In conjunction with our work with industry raising the profile and importance of MSSC-GPM training in new hires, in August, manufacturing updated its training strategy to improve engagement among participants first entering our programs. All participants are now offered access to the WRTP Manufacturing lab which provides tutoring and career development support for individuals needing to prep for direct employment or pre-employment skills training, includes an Intro to MSSC-GPM training as soon as their orientations and assessments are completed. By offering access to the Manufacturing Lab, we are able to engage more participants and keep them involved on the front end, while having a pool of ready to train/place candidates in specific jobs. With increased industry demands, the strategy is intended to decrease the time it takes to prepare the candidate for open positions. Based on industry feedback requesting that we find ways to decrease the time from selecting candidates to their start date, forty individuals took the ELMS1 course in August and another 20 are signed up for September.

#### *COMMUNITY WORKFORCE PARTNERSHIP (CWP)*

WRTP/BIG STEP worked actively with the Community Workforce Partnership in Q5 to bring community based resources to our participants throughout our programming. Community based organizations partnering with WRTP/BIG STEP include the Northcott Neighborhood House, the Milwaukee Community Service Corps, the

Milwaukee Christian Center, Legal Action of Wisconsin, Riverworks, Wisconsin Community Services, Interfaith Coalition of Milwaukee, Center for Self Sufficiency, Legal Action of Wisconsin, and the Wisconsin Seasonal Workforce Coalition. Discussions continued with the Center for Veteran's Issues, the Milwaukee Homeless Veteran's Initiative, DryHootch (AODA veteran peer counseling) and other organizations serving the veteran community to more deliberately serve veteran's with a variety of workforce access issues. One Hope Made Strong has become our newest community partner to feed our pipeline with community based residents into our training and industry certification programs,

The WRTP/BIG STEP maintains direct relationships with the MAWIB, the HIRE Center, the YWCA of Greater Milwaukee and UMOS to ensure information regarding upcoming activities is shared with their clients in a timely and organized manner. In addition, WRTP/BIG STEP worked actively with the local workforce development system and one stop job centers to recruit and identify candidates to participate in General Information Sessions as well as Manufacturing Orientation Sessions.

Referrals from these agencies are on the rise. The Community Workforce Partnership's goals are to coordinate, expand and enhance, WRTP/BIG STEP's community outreach efforts by coordinating our programming with existing community based activities. By coordinating referrals between agencies to ensure that underprivileged community residents find our programs, are prepared to enter them and have access to the full breath of community support available we ensure they are successful while training and transitioning into their new career pathways.

We continue the work reported in previous reports with emphasis being placed on the individual needs of our participants, one on one career and job placement counseling, individual training plans and classes inclusive of such programs as Healthy Marriage, the Fatherhood Initiative and construction industry focused financial training courses. In addition, we have partnered with Legal Action of Wisconsin to offer legal assistance around driver's licensing and other barriers to employment such as child support issues. Through FSET we are offering candidates the opportunity to receive work tools, uniforms and boots as well as other services provided through the program.

All of our programs are designed to ensure that the individual is not only well trained to work from the first day on the job, but also that they are prepared for the demands of the industry. We are in the process of designing a program to offer full CDL licensing to our TrANS participants as well as to our BIG STEP Tutoring participants. We anticipate this program to start by the end of 2013.

In an effort to ensure coordinated technical assistance to industry, WRTP/BIG STEP field staff meets regularly with WMEP staff to share information regarding segments of the sector with needs.

### *Agency Wide Highlights*

In fall of 2013, WRTP/BIG STEP received several honors both locally and nationally.

- The national voice of the construction industry owners' association, the Construction User's Roundtable (CURT) announced their 2013 award winners at their annual national convention in Tucson, AZ. Among their 2013 award winners for best Workforce Development nationally is the Center of Excellence- WRTP/BIG STEP based in Milwaukee, WI. According to the CURT website: <http://www.curt.org/Workforce-Development-Award-2013.aspx>: "The CURT Workforce Development Awards are designed to provide significant national and international recognition for extraordinary, exemplary, and innovative training and education programs which encourage individuals to pursue a career in the construction industry and/or enhance an individual's construction skills. The CURT

Workforce Development Award winners represent the best-in-class in a highly competitive process. We encourage you to learn more about what they are doing and implement these leading practices in your organization.” The Construction Users Roundtable® was founded by - and is driven by - many of the largest and most successful construction owners in the United States to provide the global industry a strong, singular voice to help owners’ effect positive, meaningful change and improvements.

- On September 25 in Milwaukee and on October 1st in Madison the Federal Reserve Bank of Chicago held Economic Development Forums based on the WRTP/BIG STEP report: Manufacturing Better Opportunity and A Stronger Economy. Over 150 community leaders attended the events focused on highlighting the strengths and weaknesses of the current and future manufacturing economy in the Midwest and nationally. The Federal Reserve Bank of Chicago stated in its information on the event: “Central to the discussion will be programs that the Wisconsin Regional Training Partnership (WRTP) has built over the past year that work with their partners from community, business and labor. This experience is relevant to strengthening the manufacturing sector, to building and broadening opportunity, and to developing public policies at the state and local level that help secure that connection.”
- WRTP/BIG STEP has been recognized nationally as one of the nation’s top performing non profits in the workforce development field. <http://trust.guidestar.org/2013/10/08/new-16-high-impact-workforce-development-nonprofits-identified-by-experts/>

In 2013 WRTP/BIG STEP took major steps to “green” its training curriculum. The new “green modules” in construction and manufacturing have provided WRTP/BIG STEP with unique and valuable opportunities to work both internally and externally in the community and with our industrial partners to facilitate what is becoming a significant cultural shift in the greater Milwaukee region around the perception of the value of green training. Internally, the program has allowed us the opportunity to evaluate and reinvigorate our training programs with a green focus. This in turn has translated to extensive opportunities for us to go back into quite a few manufacturers and reopen conversations around the value of green training to their bottom line in production as well as a tool for them to evaluate an employee’s potential to learn on the worksite. These conversations have extended beyond our usual partners and opened new doors throughout the greater Milwaukee region’s growing manufacturing environment. The changes are not just in manufacturing however, as we also are seeing a structural change in the way skilled labor is considering their training programs. The Bricklayers courses for example are an integral part of the work we are doing with the bricklayers as a result of conversation we originally had within the Ready to Work grant structure around offering trainings with green components. The eight green training modules that were identified are very valuable for bricklayers. These peripheral effects can be found throughout the construction and manufacturing industries in greater Milwaukee region and WRTP/BIG STEP considers them at least as valuable as the hard number counts of trainings and placements under this specific grant’s guidelines.

## **CAREER PATHWAYS & PLACEMENT ACTIVITIES**

The **WRTP/BIG STEP-Milwaukee County Ready to Work Partnership** is growing rapidly. Under the program we have doubled the number of General Information Sessions (GIS) and direct hire orientations, implemented Resource Information Sessions (RIS) sessions and related career pathway workshops, added valuable industry recognized certifications and ramped up significant field work within our targeted employment sectors.

Services Completed	Q5	Q4	Q3	Q2	Q1	Totals to date	Projected to date*
<b>Milwaukee County Residents - Recruitment &amp; Assessment</b>	<b>389</b>	396	337	340	492	1565	975
<b>Milwaukee County Residents - Career Pathway</b>	<b>165</b>	142	102	106	217	567	450
<b>Placed in Employment</b>	<b>103</b>	162	74	31	44	414	450

The following list of construction and manufacturing companies hired WRTP/BIG STEP participants in Q5:

Aeroloc, Inc	Gordon Solutions	OGC Construction
Arteaga Construction	Grunau Electric	Payne and Dolan
Badger Environmental	HB Performance Systems	Rotaform
Belonger Corporation	Hooper	Strattec
Brothers All Steam Carpet	Illingworth Kilgust Mechanical Inc.	Superior Labor Solutions
Building Services, Inc.	Integrity Environmental	Tighe Contracting Inc.
Burkhart Construction	JM Brennan	Tramont Corp.
Butters-Fetting Company	KS Energy Services Inc.	Triad Construction
CG Schmidt	Langer Roofing	Trillium Construction
Cornerstone Plumbing	Lemberg Electric Co., Inc	Uihlein Electric Co., Inc
Day & Zimmerman	M.A. Mortenson	United Scrap Metal
Everdry Waterproofing	Masterson	UPS
GE Energy	Midwest Stairs and Iron	Veit Construction
General Mills	Milwaukee Brewing Company	W.J. Sheard
Global Power Componets	Niffin	Wingra Stone

The successes of Milwaukee County Ready to Work as we close into the last quarter of the project are due to **WRTP/BIG STEP's** well developed formula. The Milwaukee County Ready to Work partnership enables us continue to scale our programming to meet the industry demands forecasted in manufacturing and construction. **WRTP/BIG STEP** is on track to meet and exceed the goals of the program to serve 1,000 new participants and place 500 Milwaukee County residents in family supporting careers by the end of Q6, January 31, 2014.



**Wisconsin Regional Training Partnership (WRTP/BIG STEP)**  
**Quarterly Narrative Report (Q6): November 1, 2013 to January 31, 2014**  
**WRTP/BIG STEP-Milwaukee County Ready to Work Partnership**

## **OVERVIEW AND BACKGROUND**

The **WRTP/BIG STEP** is an innovative and nationally recognized workforce development intermediary. As a nonprofit agency, **WRTP/BIG STEP** has developed comprehensive strategies and programs to prepare and connect unemployed workers and underserved Milwaukee County residents with family supporting careers in the Manufacturing and Construction industries, as well as emerging sectors of the private and public economy. As an intermediary, **WRTP/BIGSTEP** is an integrated funding model leveraging public and private investments and partnerships in meeting the needs of the economy and connecting people with careers.

Working with industry to close the skills gap in workforce development, **WRTP/BIG STEP's Industry led, Worker Centered and Community Focused** approach substantially improves the economic strength of the entire Milwaukee community. As an industry led organization, **WRTP/BIG STEP** works with industry to develop training and employment programs to connect Milwaukee County residents with employment and training opportunities that enhance the competitive position and sustainability of the regional construction and manufacturing industries, as well as the public sector and emerging sectors of the economy. Labor market data and recent news highlight the need to develop a skilled and qualified workforce in a coordinated manner in order to ensure the economic and social viability and vitality of the Milwaukee region.

**The Ready To Work initiative** is a “high road” approach to put real people on real family supporting career pathways by facilitating recruitment, training, direct hire, placement and retention services for Milwaukee County Residents. Complimentary to traditional “jobs programs”, **WRTP/BIG STEP** has developed a flexible and industry responsive model that identifies construction and manufacturing workforce needs first, and then develops strategies and programs to connect Milwaukee County residents with those jobs. This ensures that the training, career pathway programming, and employment support that we provide prepares individuals for placement in pre-targeted jobs upon successful completion of the programs. Our participants are placed in employment through industry designed and credentialed on the job training programs where they learn and earn as they begin their new career pathways.

## **PROGRAM ACTIVITIES**

The Ready to Work program was launched in August of 2012 with the goal of connecting Milwaukee County residents to career pathways and employment. This narrative report covers Quarter Six (Q6), the final quarter of the partnership. The project is designed to engage industry and develop education and training programs and partnerships that lead to careers and meet the needs of public and private sector employers and emerging needs within Milwaukee County. The Narrative Report is complimentary to Data & Fiscal Reporting providing to Milwaukee County, and highlights work completed in the three areas of the project design – working with industry and Milwaukee County to identify employment opportunities, expanding and enhancing community workforce partnerships, and implementing effective workforce strategies to connect individuals with education, training, and employment.

Prepared on February 28, 2014 By:

WRTP/BIG STEP, 3841 West Wisconsin Avenue, Milwaukee, WI 53208, 414-342-9787, [www.wrtp.org](http://www.wrtp.org)

## **INDUSTRY & MILWAUKEE COUNTY PARTNERSHIP**

### **Construction Program Highlights**

#### *Industry Field Work*

WRTP/BIG STEP industry field work includes networking, organizing and building relationships with employers and labor partners to identify current and projected occupational openings, to discuss and analyze skills, experience, and employment requirements for occupations and classifications, to discuss and develop workforce strategies to meet growth and expansion needs as well as advancement and retention strategies for current workers, and looking at best practices throughout industry to enhance productivity and competitiveness.

As a result of some of our field work, industry staff has been working closely with several unions to collaborate and help identify industry needs and contractor demands, so that contractors are able to continue to successfully bid on projects knowing that they can meet workforce demands.

Also on December 2, we hosted a Milwaukee County Contractor's workshop. Contractors, labor representatives and developers from all over the region were invited to learn about the Milwaukee County contracting process, workforce requirements and the resources available to them to help them successfully work with the County.

We continue to coordinate the workforce development efforts of the Milwaukee Lakefront Redevelopment project. Deconstruction has begun and will accelerate throughout the spring.

We are working with Progressive Health Centers to design local workforce recruitment and training strategies around another very large building project in Milwaukee's Central City. A first community information session and recruitment event was held in January in Milwaukee.

WRTP/BIG STEP is also working closely with contractors and various JAC committees to ensure their current RPP and COIN eligible workers are getting certified in anticipation of several new local projects with workforce requirements and also reviewing applicant lists to make certain they have a diverse pipeline of workers prepared to work as new opportunities arise. Coordinating this need in advance with contractors and the JAC's helps to make certain that the local workforce is strong enough to support the anticipated increase in demand for workers. Another JAC committee meeting was held in the first week of December at our Center of Excellence.

As a result of this highly successful Milwaukee County Ready to Work Partnership, WRTP/BIG STEP workforce development intermediary role has been at the forefront of workforce development planning projects throughout the county and a leader in the coordination of efforts among a variety of entities including public, private, industry and community based interests. By coordinating the efforts of all the parties, we are able to identify the strengths and weaknesses of the entire local construction workforce and make suggestions and recommendations that provide win-win solutions for the entire regional economy.

#### *Orientations, Direct Hire and Recruitment Activities*

Despite the challenges that winter weather in Wisconsin poses for the construction industry, November through January are busy within WRTP/BIG STEP's programs. WRTP/BIG STEP continues to hold General Information Sessions, Resource Information Sessions and BIG STEP Orientations and Manufacturing Direct Hire Orientations monthly.

WRTP/BIG STEP hosts Apprenticeship Awareness Information Days with several apprenticeship training directors at our Center of Excellence. The apprenticeship training directors are utilizing this time to discuss in detail their specific trade with prospective apprenticeship candidates. In November, the apprenticeship training directors from the Laborers and Painters unions held Apprenticeship Awareness Information Days to discuss the benefits of union membership, what an apprenticeship is, and what our candidates need to do to be ready for a career in construction. Due to the popularity of these sessions among the training directors and the attendees, more of these sessions with a variety of trades are being scheduled each month in the Center of Excellence with several scheduled throughout the spring of 2014.

On December 10th we assisted the Bricklayers by hosting and recruiting candidates for another successful Pre-Job training session to be held in 2014. Several of our current and previous Road Building Road Building participants were invited to attend.

In January 2014, we held an Apprenticeship Awareness Fair. All former construction trainees including the Road Building graduates for the last two years, were invited to attend the event held on January 17, 2014, in partnership with over 20 of Milwaukee's building and construction trades. This was a great opportunity for Milwaukee community residents to obtain information about apprenticeships from trade representatives, learn more about apprenticeship application processes, requirements, and types of work available in Milwaukee's construction sector among the tablers at the event were training directors from the Boilermakers, Bricklayers, Carpenters, Cement Masons, Electricians, Glaziers, Heat and Frost, Ironworkers, Laborers, Operating Engineers, Operating Engineers, Painters, Plasterers, Plumbers, Roofers, Sheet metal, Sprinkler fitters, Steamfitters, and Tile setters as well as contractors and associations. Over 130 residents recruited from former trainees and from the general community attended the event.

#### *Training and Career Preparation Activities*

WRTP/BIG STEP continues to increase the numbers of individuals in our tutoring program to prepare candidates for their trade of interest and help them qualify for the apprenticeship program. This increase in apprenticeship preparation is in direct response to the anticipated increase in need for new apprentices expressed by the trades as a result of the sharp expected increase in demand for construction workers due to several large projects about to begin in the greater Milwaukee area.

We are offering ongoing classes in OSHA 10 and OSHA 30 as well as Asbestos Awareness courses and trades specific classes (such as for the Bricklayers) to continue to do outreach to, follow up with and skills upgrades for incumbent workers in the trades. These activities continued throughout the quarter. WRTP/BIG STEP began an ELCS-Road Building class with 12 individuals on November 5, 2013 that ran through December 20th. As a hands-on module in this class the class rebuilt a small walkway section for a local labor union partner in conjunction with several other labor partners.

In what became a cooperative multi-trades driven training project, IBEW's Bzdawka and Jante; WRTP/BIG STEP instructor, Travis Pease from the Ironworkers; Kilah Engelke, Training Coordinator for OPMCIA 599; Matt Gahns, the Business Agent with OPMCIA 599; and Josh Tyrell, with Job Corp and an OPMCIA 599 member were all on hand for a Saturday in November to complete the project. Kurt Jante Business Agent IBEW 494 said, "A collaborative effort to replace the section of sidewalk for Building Advantage came about as John Swan III,

Representative for Laborers International Local 113, suggested this could be used as a training class by WRTP/BIG STEP for hands on experience. Working closely with WRTP/BIG STEP staff, Josh, Kilah, Matt, and Travis as instructors and the trainee's effort, all came together with the removal of the old sidewalk, forming, pouring and finishing the new sidewalk just in time before the rains came."

Hands on training is among the most effective tools in the skilled trades and the cooperative efforts of so many players really gave the WRTP/BIG STEP road building class a great an opportunity to ask questions, get dirty, and learn first-hand about a day in the life of a road building tradesperson. Kilah Engelke, Training Director OPCMIA 599 explained the project, "I was meeting with WRTP/BIG STEP and invited to participate in a project that would facilitate a relationship between IBEW 494 and OPCMIA 599. We were invited to help by providing the skills while WRTP/BIG STEP would provide the trainees through the DOT Road Building class, and IBEW would provide the material and the project to complete. This project was a culmination of the skills of several trades and was a perfect example of how solidarity, not only WITHIN each trade, but also between the trades will be how we move successfully FORWARD and into the future. This project served as a great opportunity to bring some realistic jobsite experience to these students interested in pursuing careers in road building and the OPCMIA Local 599 is eager to continue to take advantage of opportunities like this that will help us develop our work force, and that will make our unions stronger!"

The successful completion of the class led into the trainees being invited to the Apprenticeship Awareness Fair and other WRTP/BIG STEP activities as they begin their job hunts on projects crews in a variety of trades such as the downtown, lakefront and zoo interchange projects.

We held a Hazmat Training for Laborer's Local 113 in December .With the December Road Building class completed, we began planning and recruiting for our first 2014 Road Building class. Dates, etc are being confirmed with instructors as well as the number of classes we will run in 2014.

In partnership with the City of Milwaukee, our first individual in the CDL class has completed the course and received his license in December. With a success under our hats, we are now recruiting more individuals into the CDL training opportunity.

In January, WRTP/BIG STEP partnered with the City of Milwaukee, Department of Public Works to begin 30 participants on January 31, 2014 in a Landscaping training class that will last for 16 weeks. In addition to being paid during the initial training period, the City has committed to hire the majority of the candidates who complete the program.

## **Manufacturing Program Highlights**

### *Industry Field Work*

WRTP/BIG STEP's field work has been targeted strategically to assist the industry with direct employment connection, pre-employment entry-level skills training, and utilization of the IMT Apprenticeship. Assessments are continuing with several employers to determine the viability, likelihood and potential number of employment openings, including the number of individuals who can be put into apprenticeships.

Throughout the process on-going discussions via email, phone and in person contacts and programs designed to succeed are building strong relationships between WRTP/BIG STEP, labor and management in these firms. In

addition to the above partnerships and training programs the following is a list of the companies we've worked with and are continuing to work with on workforce development issues:

- a. HB Performance Systems – They have been hiring throughout the fall from our pre-employment training workshops and have scheduled a more formal training for another 12 employees in January 2014.
- b. PM Plastics- A proposal for training and placement has been approved by PM Plastics and they are asking for resumes and test scores for potential candidates. We are still negotiating terms of the placements with labor and management.
- c. Harley Davidson- We have several individuals we have trained and who are ready to be hired for positions. We are also offering them choices to take other options as they become available.
- d. Wacker Neuson- We have received a contract for workforce development with Wacker and are in the process of verifying the numbers and job classifications.
- e. Advanced Technology International (ATI-Gunstock) – ATI has begun hiring through our programs. We are placing individuals through direct hire and out of our out training programs as they continue to design an IMT programs. They are also planning an incumbent worker training in MSSC modules for a large number of employees.
- f. Pure Power Technologies- We are continuing discussions with them.
- g. GE Energy – We are continuing to work with GE to fill direct hire opportunities and are in ongoing discussions with them around new training opportunities.
- h. Ocean Spray – We are working with Ocean Spray to design IMT apprenticeship training programs for over 100 employees in the next year. These discussions are continuing in earnest.
- i. We are also continuing discussions with Preferred Brush and Miller Brewing Company around workforce development opportunities.

#### *Orientations, Direct Hire and Recruitment Activities*

WRTP/BIG STEP staff implemented a number of strategies to outreach and recruit candidates for participation in employment and training programs. The primary strategy for recruitment is the General Information Session (GIS) which is coordinated monthly and is open to residents and individual participating in workforce programs through local community organizations and/or the One Stop Job Centers.

Our Resource Information Sessions (RIS) and General Information Sessions (GIS) were held monthly throughout the quarter. The RIS is designed to assist individuals with barriers to program enrollment and employment with referrals to assistance programs within our Community Workforce Partnership.

Manufacturing Direct Hire Sessions, BIG STEP Orientations and Manufacturing Direct Hire Orientations were also held monthly during this quarter.

#### *Training and Career Preparation Activities*

In December three classes were started. The classes consisted 26 individuals .The classes received an Entry Level Manufacturing Skills (ELMS 2) certification which included introductory courses in MSSC-GPM, healthy marriage, blueprint reading, math for manufacturing, industry awareness, essential skills, OSHA safety, job readiness, and metrology. Out of the 26 participants in these three classes, 24 completed them and were certified.

- December 2<sup>nd</sup> through January 10<sup>th</sup> TJ ELMS2 with 5 members (1 dropped) in partnership with YWCA transitional jobs program for four weeks. Four completed the program.
- December 9<sup>th</sup> through January 10<sup>th</sup> another 10 (1 dropped) individuals participated in a three week ELMS2 training. Nine completed this class.
- December 16<sup>th</sup> through January 17<sup>th</sup> another 11 individuals participated in a three week ELMS2 training. All participants completed this class.

Out of the 26 individuals in these courses 24 completed training and to date 11 of them have been placed (or have placements pending with start dates in the next few days).

## **COMMUNITY FOCUSED PIPELINE DEVELOPMENT ACTIVITIES**

### *Youth Workforce Outreach and Coordination*

The WRTP/BIG STEP Pathways to Prosperity Youth Project launched earlier this year. With the assistance of the Greater Milwaukee Foundation, Pathways was able to focus in on work with Milwaukee Public Schools (MPS), helping to provide career exploration and activities to strengthen employability skills for students at the middle and high school levels.

Specifically working in locally strong industries with career opportunities for youth, WRTP/BIG STEP is recruiting and connecting industry and post-secondary partners; providing partnership training for educators and industry professionals; and, assisting with career exploration for young people through work-based learning (WBL). Work based learning includes job shadowing, industry participation in classrooms, internships, worksite tours, co-op education and youth apprenticeship. WRTP/BIG STEP brings the active involvement of industry and the credibility to convene all necessary partners to build the Pathways to Prosperity model. WRTP/BIG STEP is facilitating intense collaboration between youth, schools, industry and policymakers through the Pathways to Prosperity project.

### *Pipeline Development*

#### **COMMUNITY WORKFORCE PARTNERSHIP (CWP)**

WRTP/BIG STEP worked actively with the Community Workforce Partnership in Q6 to bring community based resources to our participants throughout our programming

We will continue the work reported in previous reports with emphasis being placed on the individual needs of our participants. Wrap around services provided by our community partners may include one on one career and job placement counseling, individual training plans and classes inclusive of such programs as Healthy Marriage, the Fatherhood Initiative and construction industry focused financial training courses. Through FSET we are offering candidates the opportunity to receive work tools, uniforms and boots as well as other services provided through the program.

All of our programs are designed to ensure that the individual is not only well trained to work from the first day on the job, but also that they are prepared for the demands of the industry. In an effort to ensure coordinated technical assistance to industry, WRTP/BIG STEP field staff meets regularly with WMEP staff to share information regarding segments of the sector with needs.

*Agency Wide recognition*

In January of 2014, the WRTP/BIG STEP programs, partnerships, trainees and employers became the focus of a trip to Milwaukee by the President of the United States, Barack Obama. Our employer driven training programs in partnership with GE Energy and partners throughout the community including our successful graduates in the early Milwaukee County Ready to Work trainings classes were the highlight of the events and showcased nationally as model workforce development programs to be replicated nationwide in and initiative the White House has titled **“Opportunity for All: Ready to Work”**.

In a report released by the White House in conjunction with the Presidential visit to Milwaukee, WRTP/BIG STEP’s unique approach is touted as among the best in the nation. In addition, Mr. Earl Buford, President and CEO of WRTP/BIG STEP was invited to sit in on a panel discussion hosted at the White House the next day by Vice President Joe Biden. Following the event, Mr. Biden announced an advisory team on workforce development on which, Mr. Buford has been invited to participate as well.

WRTP/BIG STEP and Milwaukee County have partnered under the Ready to Work initiative to create a program that is so successful the nation is taking notice.

**CAREER PATHWAYS & PLACEMENT ACTIVITIES**

The **WRTP/BIG STEP-Milwaukee County Ready to Work Partnership** is growing rapidly. Under the program we have doubled the number of General Information Sessions (GIS) and direct hire orientations, implemented Resource Information Sessions (RIS) sessions and related career pathway workshops, added valuable industry recognized certifications such as Multi-Core Craft Curriculum (MC3) and four of five MSSC modules to achieve the Certified Production Technician certification, and ramped up significant field work within our targeted employment sectors.

Services Completed	Q6	Q6	Q4	Q3	Q2	Q1	Final Contract totals
<b>Milwaukee County Residents - Recruitment &amp; Assessment</b>	<b>558</b>	389	396	337	340	492	<b>2,512</b>
<b>Milwaukee County Residents - Career Pathway</b>	<b>123</b>	165	142	102	106	217	<b>855</b>
<b>Placed in Employment</b>	<b>89</b>	103	162	74	31	44	<b>503</b>

The following is a list of some of the construction and manufacturing companies that hired WRTP/BIG STEP participants in Q6:

Aeroloc, Inc	Hetzel-Sanfilippo, Inc	Preferred Brush
Building Services, Inc.	Illingworth Kilgust Mechanical Inc.	Pieper Electric Inc.
Burkhart Construction	Integrity Environmental	PM Plastics
Butters-Fetting Company	JM Brennan	Uihlein Electric Co., Inc
C. W. Purpero	Kellmen Restoration	UPS
CG Schmidt	M.A. Mortenson	Veit
Day & Zimmerman	Marinette Marine Corp	W.J. Sheard

GE Energy	Masterson	Waste Management
Gordon Solutions	Midwest Drilled Foundations and Engineering Inc.	Wingra Stone
Harley Davidson	Musson Brothers	
HB Performance Systems	Payne and Dolan	

The successes of Milwaukee County Ready to Work as we finish of the project are due to **WRTP/BIG STEP**'s well developed and nationally recognized formula. The Milwaukee County Ready to Work partnership enables us continue to scale our programming to meet the industry demands forecasted in manufacturing and construction. **WRTP/BIG STEP** is proud to announce that it has exceeded the Milwaukee County Ready to Work Partnership's program goals to serve 1,000 new participants and place 500 Milwaukee County residents in family supporting careers by the end of January 31, 2014.

August										
Industry Focus - CONSTRUCTION										
Ready-to-Work Program Deliverables			General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program		
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 1,333.80	\$ 1,193.20		\$ 4,841.66	\$ 5,661.59	\$ 1,210.00				
b.) WFD Program Staff Fringe	\$ 223.42	\$ 346.97		\$ 1,376.85	\$ 2,320.32	\$ 92.56				
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										\$ 25.03
e.) WFD Travel										
f.) WFD Outside Auditor Services										
g.) Other (utilities)										\$ 119.64
h.) Other (insurance)										\$ 155.89
<b>Direct Costs SUBTOTAL:</b>	<b>\$ 1,557.22</b>	<b>\$ 1,540.17</b>	<b>\$ -</b>	<b>\$ 6,218.51</b>	<b>\$ 7,981.91</b>	<b>\$ 1,302.56</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 300.56</b>

<b>Expenditures-Indirect</b>										
a.) Building Depreciation										\$ 504.89
b.) Equipment Depreciation										\$ 83.86
c.) Building Operations and Maintenance										\$ 978.58
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages						\$ 860.42				
h.) Administrative Personnel's Fringe Benefits						\$ 335.77				
i.) Administration						\$ 147.18				
<b>Indirect Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,343.37</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,567.33</b>
<b>CONSTRUCTION SUBTOTAL:</b>	<b>\$ 1,557.22</b>	<b>\$ 1,540.17</b>	<b>\$ -</b>	<b>\$ 6,218.51</b>	<b>\$ 7,981.91</b>	<b>\$ 1,302.56</b>	<b>\$ 1,343.37</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,867.89</b>

Industry Focus - MANUFACTURING										
Ready-to-Work Program Deliverables			General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program		
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 939.60	\$ 1,920.44	\$ 2,395.34	\$ 6,840.24	\$ 1,815.00					
b.) WFD Program Staff Fringe	\$ 157.38	\$ 413.33	\$ 946.48	\$ 3,189.51	\$ 138.85					
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										\$ 37.55
e.) WFD Travel										
f.) WFD Outside Auditor Services										
g.) Other (utilities)										\$ 179.47
h.) Other (insurance)										\$ 233.83
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,096.98</b>	<b>\$ 2,333.77</b>	<b>\$ 3,341.82</b>	<b>\$ 10,029.75</b>	<b>\$ 1,953.85</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 450.85</b>

<b>Expenditures-Indirect</b>										
a.) Building Depreciation										\$ 757.33
b.) Equipment Depreciation										\$ 125.79
c.) Building Operations and Maintenance										\$ 1,467.88
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages						\$ 1,290.62				
h.) Administrative Personnel's Fringe Benefits						\$ 503.66				
i.) Administration						\$ 220.78				
<b>Indirect Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,015.06</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,351.00</b>
<b>MANUFACTURING SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,096.98</b>	<b>\$ 2,333.77</b>	<b>\$ 3,341.82</b>	<b>\$ 10,029.75</b>	<b>\$ 1,953.85</b>	<b>\$ 2,015.06</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,801.85</b>

Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)										
Ready-to-Work Program Deliverables			General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program		

		August									
		Industry Focus - CONSTRUCTION									
		Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect
<b>Expenditures-Direct</b>											
	a.) WFD Program Staff Salary/Wages										
	b.) WFD Program Staff Fringe										
	c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
	d.) WFD Supplies										
	e.) WFD Travel										
	f.) WFD Outside Auditor Services										
	g.) Other (utilities)										
	h.) Other (insurance)										
	<b>Direct Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Expenditures-Indirect</b>											
	a.) Building Depreciation										
	b.) Equipment Depreciation										
	c.) Building Operations and Maintenance										
	d.) Equipment and Capital Improvements										
	e.) Executive Officers' Salary/Wages										
	f.) Executive Officers' Fringe Benefits										
	g.) Administrative Personnel's Salary/Wages										
	h.) Administrative Personnel's Fringe Benefits										
	i.) Other (Please define)										
	<b>Indirect Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>OTHER SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>TOTAL-DIRECT:</b>	\$ 1,557.22	\$ 2,637.15	\$ 2,333.77	\$ 9,560.33	\$ 18,011.66	\$ 3,256.41	\$ -	\$ -	\$ -	\$ 751.41
	<b>TOTAL-INDIRECT:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,358.43	\$ -	\$ -	\$ 3,918.33
	<b>GRAND TOTAL-ALL:</b>	\$ 1,557.22	\$ 2,637.15	\$ 2,333.77	\$ 9,560.33	\$ 18,011.66	\$ 3,256.41	\$ 3,358.43	\$ -	\$ -	\$ 4,669.74

An explanation of the various Program Coordination/Support Expenses are as follows--

Industry/Field Collaboration:

Project Coordination:

Supportive Services:

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September										
Industry Focus - CONSTRUCTION										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 1,190.50		\$ 4,714.74	\$ 4,265.13	\$ 170.00					
b.) WFD Program Staff Fringe	\$ 315.96		\$ 1,643.70	\$ 1,914.75	\$ 13.00					
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies									\$ 124.81	
e.) WFD Travel								\$ 222.00		
f.) WFD Outside Auditor Services								\$ 793.84		
g.) Other (utilities)										\$ 107.82
h.) Other (insurance)										\$ 148.02
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,506.46</b>	<b>\$ -</b>	<b>\$ 6,358.44</b>	<b>\$ 6,179.88</b>	<b>\$ 183.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,015.84</b>	<b>\$ 380.65</b>
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										\$ 542.19
b.) Equipment Depreciation										\$ 90.06
c.) Building Operations and Maintenance										\$ 1,098.59
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages						\$ 753.52				
h.) Administrative Personnel's Fringe Benefits						\$ 308.41				
i.) Administration						\$ 162.56				
<b>Indirect Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,224.49</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,730.84</b>
<b>CONSTRUCTION SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,506.46</b>	<b>\$ -</b>	<b>\$ 6,358.44</b>	<b>\$ 6,179.88</b>	<b>\$ 183.00</b>	<b>\$ 1,224.49</b>	<b>\$ -</b>	<b>\$ 1,015.84</b>	<b>\$ 2,111.49</b>
Industry Focus - MANUFACTURING										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 935.55	\$ 1,660.92	\$ 2,204.98	\$ 5,659.09	\$ 255.00					
b.) WFD Program Staff Fringe	\$ 120.76	\$ 649.36	\$ 1,360.08	\$ 2,726.03	\$ 19.51					
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										\$ 187.22
e.) WFD Travel										
f.) WFD Outside Auditor Services								\$ 1,190.76		
g.) Other (utilities)										\$ 161.73
h.) Other (insurance)										\$ 222.03
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,056.31</b>	<b>\$ 2,310.28</b>	<b>\$ 3,565.06</b>	<b>\$ 8,385.12</b>	<b>\$ 274.51</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,190.76</b>	<b>\$ 570.98</b>
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										\$ 656.33
b.) Equipment Depreciation										\$ 109.02
c.) Building Operations and Maintenance										\$ 1,638.85
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages						\$ 1,130.29				
h.) Administrative Personnel's Fringe Benefits						\$ 462.62				
i.) Administration						\$ 243.84				
<b>Indirect Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,836.75</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,404.20</b>
<b>MANUFACTURING SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,056.31</b>	<b>\$ 2,310.28</b>	<b>\$ 3,565.06</b>	<b>\$ 8,385.12</b>	<b>\$ 274.51</b>	<b>\$ 1,836.75</b>	<b>\$ -</b>	<b>\$ 1,190.76</b>	<b>\$ 2,975.18</b>
Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			

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September										
Industry Focus - CONSTRUCTION										
	Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages										
b.) WFD Program Staff Fringe										
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										
e.) WFD Travel										
f.) WFD Outside Auditor Services										
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages										
h.) Administrative Personnel's Fringe Benefits										
i.) Other (Please define)										
<b>Indirect Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>OTHER SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL-DIRECT:</b>	\$ -	\$ 2,562.77	\$ 2,310.28	\$ 9,923.50	\$ 14,565.00	\$ 457.51	\$ -	\$ -	\$ 2,206.60	\$ 951.63
<b>TOTAL-INDIRECT:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,061.24	\$ -	\$ -	\$ 4,135.04
<b>GRAND TOTAL-ALL:</b>	\$ -	\$ 2,562.77	\$ 2,310.28	\$ 9,923.50	\$ 14,565.00	\$ 457.51	\$ 3,061.24	\$ -	\$ 2,206.60	\$ 5,086.67

An explanation of the various Program Coordinati

Industry/Field Collaboration:

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Project Coordination:

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Supportive Services:

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**Expenditures-Direct**

- a.) WFD Program Staff Salary/Wages
- b.) WFD Program Staff Fringe
- c.) WFD Consultants (i.e. Not WRTP/Big Step staff)
- d.) WFD Supplies
- e.) WFD Travel
- f.) WFD Outside Auditor Services
- g.) Other (utilities)
- h.) Other (insurance)

**Direct Costs SUBTOTAL:**

**Expenditures-Indirect**

- a.) Building Depreciation
- b.) Equipment Depreciation
- c.) Building Operations and Maintenance
- d.) Equipment and Capital Improvements
- e.) Executive Officers' Salary/Wages
- f.) Executive Officers' Fringe Benefits
- g.) Administrative Personnel's' Salary/Wages
- h.) Administrative Personnel's' Fringe Benefits
- i.) Administration

**Indirect Costs SUBTOTAL:**

**CONSTRUCTION SUBTOTAL:**

**October**

Industry Focus - CONSTRUCTION

Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
	\$ 1,568.40		\$ 3,520.41	\$ 11,263.92	\$ 440.00					
	\$ 378.73		\$ 973.27	\$ 3,006.45	\$ 33.65					
									\$ 75.60	
								\$ 227.61		
							\$ 880.50			
									\$ 94.61	
									\$ 235.86	
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,947.13</b>	<b>\$ -</b>	<b>\$ 4,493.68</b>	<b>\$ 14,270.37</b>	<b>\$ 473.65</b>	<b>\$ -</b>	<b>\$ 880.50</b>	<b>\$ 227.61</b>	<b>\$ 406.07</b>

Industry Focus - MANUFACTURING

**Expenditures-Direct**

- a.) WFD Program Staff Salary/Wages
- b.) WFD Program Staff Fringe
- c.) WFD Consultants (i.e. Not WRTP/Big Step staff)
- d.) WFD Supplies
- e.) WFD Travel
- f.) WFD Outside Auditor Services
- g.) Other (utilities)
- h.) Other (insurance)

**Direct Costs SUBTOTAL:**

**Expenditures-Indirect**

- a.) Building Depreciation
- b.) Equipment Depreciation
- c.) Building Operations and Maintenance
- d.) Equipment and Capital Improvements
- e.) Executive Officers' Salary/Wages
- f.) Executive Officers' Fringe Benefits
- g.) Administrative Personnel's' Salary/Wages
- h.) Administrative Personnel's' Fringe Benefits
- i.) Administration

**Indirect Costs SUBTOTAL:**

**MANUFACTURING SUBTOTAL:**

Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
	\$ 1,077.30	\$ 2,335.68	\$ 5,280.63	\$ 14,192.83	\$ 660.00					
	\$ 82.96	\$ 1,366.67	\$ 1,459.91	\$ 3,795.49	\$ 50.49					
									\$ 113.40	
								\$ 341.42		
							\$ 1,320.78			
									\$ 141.92	
									\$ 353.80	
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,160.26</b>	<b>\$ 3,702.35</b>	<b>\$ 6,740.54</b>	<b>\$ 17,988.32</b>	<b>\$ 710.49</b>	<b>\$ -</b>	<b>\$ 1,320.78</b>	<b>\$ 341.42</b>	<b>\$ 609.12</b>

Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)

Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program		
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October										
Industry Focus - CONSTRUCTION										
	Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages										
b.) WFD Program Staff Fringe										
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										
e.) WFD Travel										
f.) WFD Outside Auditor Services										
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's' Salary/Wages										
h.) Administrative Personnel's' Fringe Benefits										
i.) Other (Please define)										
<b>Indirect Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>OTHER SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL-DIRECT:</b>	\$ -	\$ 3,107.39	\$ 3,702.35	\$ 11,234.22	\$ 32,258.69	\$ 1,184.14	\$ -	\$ 2,201.28	\$ 569.03	\$ 1,015.19
<b>TOTAL-INDIRECT:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,519.48	\$ -	\$ -	\$ 4,810.83
<b>GRAND TOTAL-ALL:</b>	\$ -	\$ 3,107.39	\$ 3,702.35	\$ 11,234.22	\$ 32,258.69	\$ 1,184.14	\$ 5,519.48	\$ 2,201.28	\$ 569.03	\$ 5,826.02

An explanation of the various Program Coordinati

Industry/Field Collaboration:

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Project Coordination:

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Supportive Services:

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**A. Recruitment and Assessment**

- 1.) Recruitment and Assessment:**  
 a.) General Orientation Sessions  
 b.) Assessment Sessions  
 c.) Resource Information Sessions  
 d.) Community Referral Networking

Aug-13							
Recruitment and Assessment Services							
# of Participants Served	# of Participants placed into Career Pathways/ Training Services	Construction		Manufacturing		Other (please define)	
		# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)
171	78	0	28	0	22	0	3
<b>RECRUITMENT AND ASSESSMENT SUBTOTAL:</b>							
171	78	0	28	0	22	0	3

**B. Career Pathway Service/Training**

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - CONSTRUCTION							
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed
0	0						
16	12						
36	1	1					
54			54	0	54		
54						54	0
<b>CONSTRUCTION SUBTOTAL:</b>							
160	13	1	54	0	54	54	0

**B. Career Pathway Service/Training**

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - MANUFACTURING							
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed
0	0						
26	18						
22			22	0	22		
22						22	0
<b>MANUFACTURING SUBTOTAL:</b>							
70	18	0	22	0	22	22	0

**B. Career Pathway Service/Training**

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)							
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed
0	0						
0	0						
3			3		3		
3						3	0
<b>OTHER SUBTOTAL:</b>							
-1	0	0	3	0	3	3	0
<b>GRAND TOTAL:</b>							
171	31	1	79	0	53	79	0
229			Via Recrt/Assess: 0	0	79		

**NOTES:**  
 \*Assuming all of the above is correct, it would make sense to have each Ready-to-Work participant be counted uniquely. Each participant (served) is initially counted in the Recruitment and Assessment phase. As a part receive. To avoid double-counting of a participant that receives multiple Career Pathway services/trainings, please put in a negative number in the "# of Participants Served" column for each month. For instance, if one

**REFERENCES:**  
 \*(1) WRT/Big Step to detail the number of **Opportunities** that are Milwaukee County Job related and the number of **Opportunities** that are Private-Sector related.  
 \*(2) and (3) WRT/Big Step to detail the number of **Jobs** that are Milwaukee County Jobs and the number of Private-Sector Jobs.

2013 - Quarterly Report 5

Sep-13

**A. Recruitment and Assessment**

- 1.) **Recruitment and Assessment:**  
 a.) General Orientation Sessions  
 b.) Assessment Sessions  
 c.) Resource Information Sessions  
 d.) Community Referral Networking

Recruitment and Assessment Services									
		Construction		Manufacturing		Other (please define)			
# of Participants Served	# of Participants placed into Career Pathways/ Training Services	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)		
101	48	0	9	0	7	0	4		
<b>RECRUITMENT AND ASSESSMENT SUBTOTAL:</b>		101	48	0	9	0	7	0	4

**B. Career Pathway Service/Training**

- 1.) **Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) **Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) **Pre-Apprenticeship Tutoring**
- 4.) **Placement Support**
- 5.) **Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - CONSTRUCTION								
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are <u>still employed</u>	# of Participants that Received Retention Services but are <u>no longer employed</u>	
0	0							
3	3							
37	1	1						
9			9	0	9			
9						9	0	
-3								
<b>CONSTRUCTION SUBTOTAL:</b>		55	4	1	9	0	9	0

**B. Career Pathway Service/Training**

- 1.) **Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) **Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) **Pre-Apprenticeship Tutoring**
- 4.) **Placement Support**
- 5.) **Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - MANUFACTURING								
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are <u>still employed</u>	# of Participants that Received Retention Services but are <u>no longer employed</u>	
0	0							
8	0							
7			7	0	7			
7						7		
0								
<b>MANUFACTURING SUBTOTAL:</b>		22	0	0	7	0	7	0

**B. Career Pathway Service/Training**

- 1.) **Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) **Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) **Pre-Apprenticeship Tutoring**
- 4.) **Placement Support**
- 5.) **Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)								
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are <u>still employed</u>	# of Participants that Received Retention Services but are <u>no longer employed</u>	
0	0							
0	0							
4			4		4			
4						4		
-1								
<b>OTHER SUBTOTAL:</b>		7	0	0	4	0	4	0
<b>GRAND TOTAL:</b>		see below	4	1	20	see below	20	0
		101			Via Recrt(Access)	0	20	
		84			Via Career Pathway	0	20	

**NOTES:**  
 \*Assuming all of the above is correct, it would make sense if participant is funneled into the Career Pathways Services/Training they are also tracked by the service they receive. To avoid double-counting of a participant that rec(1) participant in the Construction industry-Focus area receives Career Exploration Training as well

**REFERENCES:**  
 \*(1) W RTP/Big Step to detail the number of Opportunities  
 \*(2) and (3) W RTP/Big Step to detail the number of Jobs th

**A. Recruitment and Assessment**

- 1) **Recruitment and Assessment:**  
 a.) General Orientation Sessions  
 b.) Assessment Sessions  
 c.) Resource Information Sessions  
 d.) Community Referral Networking

Oct-13									
Recruitment and Assessment Services									
		Construction		Manufacturing		Other (please define)			
# of Participants Served	# of Participants placed into Career Pathways/ Training Services	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)		
117	39	0	17	0	7	0	6		
<b>RECRUITMENT AND ASSESSMENT SUBTOTAL:</b>		117	39	0	17	0	7	0	6

**B. Career Pathway Service/Training**

- 1) **Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2) **Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3) **Pre-Apprenticeship Tutoring**
- 4) **Placement Support**
- 5) **Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - CONSTRUCTION								
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are <u>still employed</u>	# of Participants that Received Retention Services but are <u>no longer employed</u>	
0	0							
11	10							
28	0	0						
17			17	0	17			
17						17		
-8								
<b>CONSTRUCTION SUBTOTAL:</b>		65	10	0	17	0	17	0

**B. Career Pathway Service/Training**

- 1) **Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2) **Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3) **Pre-Apprenticeship Tutoring**
- 4) **Placement Support**
- 5) **Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - MANUFACTURING								
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are <u>still employed</u>	# of Participants that Received Retention Services but are <u>no longer employed</u>	
0	0							
0	0							
0	0	0						
7			7	0	7			
7						7		
0								
<b>MANUFACTURING SUBTOTAL:</b>		14	0	0	7	0	7	0

**B. Career Pathway Service/Training**

- 1) **Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2) **Specialized Occupational Skills Training**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3) **Pre-Apprenticeship Tutoring**
- 4) **Placement Support**
- 5) **Retention Services**  
 ADJ for Participants receiving multiple services/training:

Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)								
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are <u>still employed</u>	# of Participants that Received Retention Services but are <u>no longer employed</u>	
0	0							
0	0							
6			6		6			
6						6		
-1								
<b>OTHER SUBTOTAL:</b>		11	0	0	6	0	6	0
<b>GRAND TOTAL:</b>		see below	10	0	30	see below	30	0
		117			30	0	30	
		90			0	30	30	

**NOTES:**  
 \*Assuming all of the above is correct, it would make sense receive. To avoid double-counting of a participant that rec

**REFERENCES:**  
 \*(1) WRT/Big Step to detail the number of **Opportunities** t  
 \*(2) and (3) WRT/Big Step to detail the number of **Jobs** th

Table 1

## Quarterly Report 1

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
AUG 2012	\$ 32,868.50	\$ 9,225.50	\$ 42,094.00
SEPT 2012	\$ 34,155.84	\$ 10,144.47	\$ 44,300.31
OCT 2012	<u>\$ 68,033.10</u>	<u>\$ 13,220.82</u>	<u>\$ 81,253.92</u>
Q1 Total	\$ 135,057.44	\$ 32,590.79	\$ 167,648.23

## Quarterly Report 2

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
NOV 2012	\$ 41,099.49	\$ 11,627.35	\$ 52,726.84
DEC 2012	\$ 37,498.45	\$ 8,705.71	\$ 46,204.16
JAN 2013	<u>\$ 54,520.35</u>	<u>\$ 11,542.72</u>	<u>\$ 66,063.07</u>
Q2 Total	\$ 133,118.29	\$ 31,875.78	\$ 164,994.07

## Quarterly Report 3

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
FEB 2013	\$ 36,049.58	\$ 10,040.09	\$ 46,089.67
MARCH 2013	\$ 35,310.81	\$ 9,788.29	\$ 45,099.10
APRIL 2013	<u>\$ 38,352.74</u>	<u>\$ 11,779.02</u>	<u>\$ 50,131.76</u>
Q3 Total	\$ 109,713.13	\$ 31,607.40	\$ 141,320.53

## Quarterly Report 4

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
MAY 2013	\$ 85,610.34	\$ 14,425.47	\$ 100,035.81
JUNE 2013	\$ 41,985.36	\$ 17,114.14	\$ 59,099.50
JULY 2013	<u>\$ 54,358.70</u>	<u>\$ 14,380.21</u>	<u>\$ 68,738.91</u>
Q4 Total	\$ 181,954.40	\$ 45,919.82	\$ 227,874.22

## Quarterly Report 5

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
AUG 2013	\$ 38,107.95	\$ 7,276.76	\$ 45,384.71
SEPT 2013	\$ 32,977.29	\$ 7,196.28	\$ 40,173.57
OCT 2013	<u>\$ 55,272.29</u>	<u>\$ 10,330.31</u>	<u>\$ 65,602.60</u>
Q5 Total	\$ 126,357.53	\$ 24,803.35	\$ 151,160.88

<b>TOTALS</b>	<b>\$ 686,200.79</b>	<b>\$ 166,797.14</b>	<b>\$ 852,997.93</b>
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Table 2

Allowable Indirect Costs Per Agreement:	\$ 150,000
Allowable Indirect Costs in previous quarters:	\$ 141,993.79
Allowable Indirect Costs Incurred this Quarter:	<u>\$ 24,803.35</u>
Remaining Allowable Indirect Costs:	\$ (16,797.14)

*\*NOTE: Per the agreement (p. 8, Section 28), the outside auditing costs of \$50k or less, are not applied to the 15% indirect cost provision noted in Section 4 (p.2) of the agreement.*

Table 1

	Q5	Q4	Q3	Q2	Q1	Totals
Milwaukee County Residents - Recruitment & Assessment:	<b>389</b>	396	337	340	492	1954
**Milwaukee County Residents - Career Pathway:	<b>165</b>	142	102	106	217	732
Placement in Employment:	<b>103</b>	162	74	31	44	414
<i>*These participants received the Ready-to-Work program's Recruitment and Assessment services (phase 1) are now receiving Career Pathway services and training (phase 2).</i>						

Table 2

<b><u>Milwaukee County Residents Placed in Employment</u></b>				
sub-1		<u>Construction</u>	<u>Manufacturing</u>	<u>Other (please define)</u>
	*Full-Time:	54	36	13
	*Part-Time or Seasonal:	0	0	0
	TOTAL:	54	36	13
<b>Construction</b>				
sub-2		<u>Private</u>	<u>County</u>	
	*Full-Time:	54	0	
	*Part-Time or Seasonal:	0	0	
	TOTAL:	54	0	
<b>Manufacturing</b>				
sub-3		<u>Private</u>	<u>County</u>	
	*Full-Time:	36	0	
	*Part-Time or Seasonal:	0	0	
	TOTAL:	36	0	
<b>Other (please define)</b>				
sub-4		<u>Private</u>	<u>County</u>	
	*Full-Time:	13	0	
	*Part-Time or Seasonal:	0	0	
	TOTAL:	13	0	

November										
Industry Focus - CONSTRUCTION										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 1,018.30		\$ 2,346.94	\$ 6,862.02	\$ 810.00					
b.) WFD Program Staff Fringe	\$ 317.45		\$ 754.61	\$ 2,074.07	\$ 61.96					
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										
e.) WFD Travel								\$ 220.85		
f.) WFD Outside Auditor Services							\$ 2,587.72			
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	\$ -	\$ 1,335.75	\$ -	\$ 3,101.55	\$ 8,936.09	\$ 871.96	\$ -	\$ 2,587.72	\$ 220.85	\$ -

<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages										
h.) Administrative Personnel's Fringe Benefits										
i.) Administration										
<b>Indirect Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>CONSTRUCTION SUBTOTAL:</b>	\$ -	\$ 1,335.75	\$ -	\$ 3,101.55	\$ 8,936.09	\$ 871.96	\$ -	\$ 2,587.72	\$ 220.85	\$ -

Industry Focus - MANUFACTURING										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 677.25	\$ 1,557.12	\$ 3,520.42	\$ 9,201.93	\$ 1,215.00					
b.) WFD Program Staff Fringe	\$ 51.82	\$ 664.22	\$ 1,131.88	\$ 3,174.57	\$ 92.95					
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										
e.) WFD Travel										
f.) WFD Outside Auditor Services							\$ 5,371.06			
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	\$ -	\$ 729.07	\$ 2,221.34	\$ 4,652.30	\$ 12,376.50	\$ 1,307.95	\$ -	\$ 5,371.06	\$ -	\$ -

<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages										
h.) Administrative Personnel's Fringe Benefits										
i.) Administration										
<b>Indirect Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>MANUFACTURING SUBTOTAL:</b>	\$ -	\$ 729.07	\$ 2,221.34	\$ 4,652.30	\$ 12,376.50	\$ 1,307.95	\$ -	\$ 5,371.06	\$ -	\$ -

Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			

		November									
		Industry Focus - CONSTRUCTION									
		Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect
<b>Expenditures-Direct</b>											
	a.) WFD Program Staff Salary/Wages										
	b.) WFD Program Staff Fringe										
	c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
	d.) WFD Supplies										
	e.) WFD Travel										
	f.) WFD Outside Auditor Services										
	g.) Other (utilities)										
	h.) Other (insurance)										
	<b>Direct Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Expenditures-Indirect</b>											
	a.) Building Depreciation										
	b.) Equipment Depreciation										
	c.) Building Operations and Maintenance										
	d.) Equipment and Capital Improvements										
	e.) Executive Officers' Salary/Wages										
	f.) Executive Officers' Fringe Benefits										
	g.) Administrative Personnel's Salary/Wages										
	h.) Administrative Personnel's Fringe Benefits										
	i.) Other (Please define)										
	<b>Indirect Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>OTHER SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>TOTAL-DIRECT:</b>	\$ -	\$ 2,064.82	\$ 2,221.34	\$ 7,753.85	\$ 21,312.59	\$ 2,179.91	\$ -	\$ 7,958.78	\$ 220.85	\$ -
	<b>TOTAL-INDIRECT:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>GRAND TOTAL-ALL:</b>	\$ -	\$ 2,064.82	\$ 2,221.34	\$ 7,753.85	\$ 21,312.59	\$ 2,179.91	\$ -	\$ 7,958.78	\$ 220.85	\$ -

An explanation of the various Program Coordination/Support Expenses are as follows--

Industry/Field Collaboration:

Project Coordination:

Supportive Services:

\$ -

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December										
Industry Focus - CONSTRUCTION										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 733.00		\$ 1,765.34	\$ 5,318.04	\$ 160.00					
b.) WFD Program Staff Fringe	\$ 269.92		\$ 656.47	\$ 1,940.00	\$ 12.24					
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										
e.) WFD Travel								\$ 150.00		
f.) WFD Outside Auditor Services										
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,002.92</b>	<b>\$ -</b>	<b>\$ 2,421.81</b>	<b>\$ 7,258.04</b>	<b>\$ 172.24</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 150.00</b>	<b>\$ -</b>
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages										
h.) Administrative Personnel's Fringe Benefits										
i.) Administration										
<b>Indirect Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>CONSTRUCTION SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 1,002.92</b>	<b>\$ -</b>	<b>\$ 2,421.81</b>	<b>\$ 7,258.04</b>	<b>\$ 172.24</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 150.00</b>	<b>\$ -</b>
Industry Focus - MANUFACTURING										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 445.50	\$ 1,557.12	\$ 2,648.02	\$ 9,027.66	\$ 240.00					
b.) WFD Program Staff Fringe	\$ 49.64	\$ 762.53	\$ 984.70	\$ 3,510.76	\$ 18.36					
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)								\$ 7,000.00		
d.) WFD Supplies										
e.) WFD Travel										
f.) WFD Outside Auditor Services										
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 495.14</b>	<b>\$ 2,319.65</b>	<b>\$ 3,632.72</b>	<b>\$ 12,538.42</b>	<b>\$ 258.36</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 7,000.00</b>	<b>\$ -</b>
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages										
h.) Administrative Personnel's Fringe Benefits										
i.) Administration										
<b>Indirect Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>MANUFACTURING SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 495.14</b>	<b>\$ 2,319.65</b>	<b>\$ 3,632.72</b>	<b>\$ 12,538.42</b>	<b>\$ 258.36</b>	<b>\$ -</b>	<b>\$ 7,000.00</b>	<b>\$ -</b>	<b>\$ -</b>
Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			

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December										
Industry Focus - CONSTRUCTION										
	Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages										
b.) WFD Program Staff Fringe										
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)										
d.) WFD Supplies										
e.) WFD Travel										
f.) WFD Outside Auditor Services										
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages										
h.) Administrative Personnel's Fringe Benefits										
i.) Other (Please define)										
<b>Indirect Costs SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>OTHER SUBTOTAL:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL-DIRECT:</b>	\$ -	\$ 1,498.06	\$ 2,319.65	\$ 6,054.53	\$ 19,796.46	\$ 430.60	\$ -	\$ -	\$ 7,150.00	\$ -
<b>TOTAL-INDIRECT:</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>GRAND TOTAL-ALL:</b>	\$ -	\$ 1,498.06	\$ 2,319.65	\$ 6,054.53	\$ 19,796.46	\$ 430.60	\$ -	\$ -	\$ 7,150.00	\$ -

An explanation of the various Program Coordinati

Industry/Field Collaboration:

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Project Coordination:

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Supportive Services:

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Jan-14										
Industry Focus - CONSTRUCTION										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 2,918.95		\$ 3,456.54	\$ 9,505.13						
b.) WFD Program Staff Fringe	\$ 2,021.01		\$ 1,923.97	\$ 3,767.99						
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)		\$ 4,360.67								
d.) WFD Supplies										
e.) WFD Travel										
f.) WFD Outside Auditor Services										
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 4,939.96</b>	<b>\$ 4,360.67</b>	<b>\$ 5,380.51</b>	<b>\$ 13,273.12</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages										
h.) Administrative Personnel's Fringe Benefits										
i.) Administration										
<b>Indirect Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>CONSTRUCTION SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 4,939.96</b>	<b>\$ 4,360.67</b>	<b>\$ 5,380.51</b>	<b>\$ 13,273.12</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
Industry Focus - MANUFACTURING										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			
Recruitment and Assessment	Career Pathway Service/Training	Industry/Field Collaboration	Project Coordination	Supportive Services	Training Support	Administration	Outside Auditor Service	Other Direct	Other Indirect	
<b>Expenditures-Direct</b>										
a.) WFD Program Staff Salary/Wages	\$ 585.23	\$ 3,373.76	\$ 5,184.82	\$ 14,552.50						
b.) WFD Program Staff Fringe	\$ 98.02	\$ 1,031.60	\$ 2,886.02	\$ 10,185.81						
c.) WFD Consultants (i.e. Not WRTP/Big Step staff)								\$ 17,000.00		
d.) WFD Supplies										
e.) WFD Travel										
f.) WFD Outside Auditor Services										
g.) Other (utilities)										
h.) Other (insurance)										
<b>Direct Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 683.25</b>	<b>\$ 4,405.36</b>	<b>\$ 8,070.84</b>	<b>\$ 24,738.31</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 17,000.00</b>	<b>\$ -</b>
<b>Expenditures-Indirect</b>										
a.) Building Depreciation										
b.) Equipment Depreciation										
c.) Building Operations and Maintenance										
d.) Equipment and Capital Improvements										
e.) Executive Officers' Salary/Wages										
f.) Executive Officers' Fringe Benefits										
g.) Administrative Personnel's Salary/Wages										
h.) Administrative Personnel's Fringe Benefits										
i.) Administration										
<b>Indirect Costs SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>MANUFACTURING SUBTOTAL:</b>	<b>\$ -</b>	<b>\$ 683.25</b>	<b>\$ 4,405.36</b>	<b>\$ 8,070.84</b>	<b>\$ 24,738.31</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 17,000.00</b>	<b>\$ -</b>
Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)										
Ready-to-Work Program Deliverables		General Ready-to-Work Program Coordination/Support					Other General Ready-to-Work Program			



**Nov-13**

**Recruitment and Assessment Services**

# of Participants Served	# of Participants placed into Career Pathways/ Training Services	Construction		Manufacturing		Other (please define)			
		# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)		
185	40	0	19	0	14	0	4		
<b>RECRUITMENT AND ASSESSMENT SUBTOTAL:</b>		185	40	0	19	0	14	0	4

- 1.) Recruitment and Assessment:**
- a.) General Orientation Sessions
  - b.) Assessment Sessions
  - c.) Resource Information Sessions
  - d.) Community Referral Networking

**B. Career Pathway Service/Training**

- 1.) Career Exploration:**
- a.) Youth Apprenticeship
  - b.) Youth Internship
  - c.) Subsidized Work Experience
  - d.) Job Shadowing Opportunities
  - e.) Resume Development
  - f.) Career Planning Support

- 2.) Specialized Occupational Skills Training:**
- a.) Short-Term/State-certified pre-employment training
  - b.) On the Job Training
  - c.) Customized Pre-Employment Training
  - d.) Incumbent and Workplace based Training

- 3.) Pre-Apprenticeship Tutoring**

- 4.) Placement Support**

- 5.) Retention Services**

ADI for Participants receiving multiple services/training:

**CONSTRUCTION SUBTOTAL:**

**Industry Focus - CONSTRUCTION**

# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed	
17	17							
18	13							
22	1	1						
19			19	0	19			
19						19	0	
<b>CONSTRUCTION SUBTOTAL:</b>		95	31	1	19	0	19	0

**B. Career Pathway Service/Training**

- 1.) Career Exploration:**
- a.) Youth Apprenticeship
  - b.) Youth Internship
  - c.) Subsidized Work Experience
  - d.) Job Shadowing Opportunities
  - e.) Resume Development
  - f.) Career Planning Support

- 2.) Specialized Occupational Skills Training:**
- a.) Short-Term/State-certified pre-employment training
  - b.) On the Job Training
  - c.) Customized Pre-Employment Training
  - d.) Incumbent and Workplace based Training

- 3.) Pre-Apprenticeship Tutoring**

- 4.) Placement Support**

- 5.) Retention Services**

ADI for Participants receiving multiple services/training:

**MANUFACTURING SUBTOTAL:**

**Industry Focus - MANUFACTURING**

# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed	
65	65							
0	0							
14			14	0	14			
14						14	0	
<b>MANUFACTURING SUBTOTAL:</b>		93	65	0	14	0	14	0

**B. Career Pathway Service/Training**

- 1.) Career Exploration:**
- a.) Youth Apprenticeship
  - b.) Youth Internship
  - c.) Subsidized Work Experience
  - d.) Job Shadowing Opportunities
  - e.) Resume Development
  - f.) Career Planning Support

- 2.) Specialized Occupational Skills Training:**
- a.) Short-Term/State-certified pre-employment training
  - b.) On the Job Training
  - c.) Customized Pre-Employment Training
  - d.) Incumbent and Workplace based Training

- 3.) Pre-Apprenticeship Tutoring**

- 4.) Placement Support**

- 5.) Retention Services**

ADI for Participants receiving multiple services/training:

**OTHER SUBTOTAL:**

**GRAND TOTAL:**

**Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)**

# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed	
103	103							
0	0							
4			4		4			
4						4	0	
<b>OTHER SUBTOTAL:</b>		111	103	0	4	0	4	0
<b>GRAND TOTAL:</b>		see below	199	1	37	see below	37	0
		185				0		
		299				0	37	

**NOTES:**  
 \*Assuming all of the above is correct, it would make sense to have each Ready-to-Work participant be counted uniquely. Each participant (served) is initially counted in the Recruitment and Assessment phase. As service they receive. To avoid double-counting of a participant that receives multiple Career Pathway services/trainings, please put in a negative number in the "# of Participants Served" column for each month. F

**REFERENCES:**  
 \*(1) WRTWP/Big Step to detail the number of **Opportunities** that are Milwaukee County Job related and the number of **Opportunities** that are Private-Sector related.  
 \*(2) and (3) WRTWP/Big Step to detail the number of **Jobs** that are Milwaukee County Jobs and the number of Private-Sector Jobs.

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Dec-13

**A. Recruitment and Assessment**

Recruitment and Assessment Services									
		Construction		Manufacturing		Other (please define)			
# of Participants Served	# of Participants placed into Career Pathways/ Training Services	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)		
156	57	0	8	0	15	0	7		
<b>RECRUITMENT AND ASSESSMENT SUBTOTAL:</b>		156	57	0	8	0	15	0	7

- 1.) Recruitment and Assessment:**  
 a.) General Orientation Sessions  
 b.) Assessment Sessions  
 c.) Resource Information Sessions  
 d.) Community Referral Networking

**B. Career Pathway Service/Training**

Industry Focus - CONSTRUCTION									
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed		
23	23								
14	1								
21	0	0							
8			8	0	8				
8						0	8		
0									
<b>CONSTRUCTION SUBTOTAL:</b>		74	24	0	8	0	8	0	8

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training:**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADI for Participants receiving multiple services/training:

**B. Career Pathway Service/Training**

Industry Focus - MANUFACTURING									
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed		
4	4								
21	20								
15			15	0	15				
15						15			
0									
<b>MANUFACTURING SUBTOTAL:</b>		55	24	0	15	0	15	15	0

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training:**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADI for Participants receiving multiple services/training:

**B. Career Pathway Service/Training**

Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)									
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed		
129	129								
0	0								
7		0	7	0	7				
7						7			
0									
<b>OTHER SUBTOTAL:</b>		144	129	0	7	0	7	7	0
<b>GRAND TOTAL:</b>		see below	177	0	30	see below	see below	22	8
		156			via Recrt/Assess: 0	see below 30			
		273			via Career Pathways 0	30			

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training:**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADI for Participants receiving multiple services/training:

**NOTES:**

\*Assuming all of the above is correct, it would make sense participant is funneled into the Career Pathways Services/Training they are also tracked by the service they receive. To avoid double-counting of a participant instance, if one (1) participant in the Construction Industry-Focus area receives Career

**REFERENCES:**

- \* (1) WRT/Big Step to detail the number of **Opportunities**  
 \* (2) and (3) WRT/Big Step to detail the number of **Jobs**

**A. Recruitment and Assessment**

Jan-14									
Recruitment and Assessment Services									
		Construction		Manufacturing		Other (please define)			
# of Participants Served	# of Participants placed into Career Pathways/ Training Services	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)		
217	26	0	5	0	17	0	0		
<b>RECRUITMENT AND ASSESSMENT SUBTOTAL:</b>		217	26	0	5	0	17	0	0

- 1.) Recruitment and Assessment:**  
 a.) General Orientation Sessions  
 b.) Assessment Sessions  
 c.) Resource Information Sessions  
 d.) Community Referral Networking

**B. Career Pathway Service/Training**

Industry Focus - CONSTRUCTION									
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed		
65	65								
0	0								
26	0	0							
5			5	0	5				
5						5			
0									
<b>CONSTRUCTION SUBTOTAL:</b>		101	65	0	5	0	5	5	0

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training:**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADJ for Participants receiving multiple services/training:

**B. Career Pathway Service/Training**

Industry Focus - MANUFACTURING									
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed		
66	66								
0	0								
0	0	0							
17			17	0	17				
17						17			
0									
<b>MANUFACTURING SUBTOTAL:</b>		100	66	0	17	0	17	17	0

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training:**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADJ for Participants receiving multiple services/training:

**B. Career Pathway Service/Training**

Industry Focus - OTHER (PLEASE DEFINE INDUSTRY)									
# of Participants Served	# of Participants that Completed Training	# of Participants Successfully passing the ACCUPLACER Test	# of Employment Opportunities for Participants (1)	# of Participants Placed in Seasonal or Part-Time Employment (2)	# of Participants Placed in Full-Time Employment (3)	# of Participants that Received Retention Services and are still employed	# of Participants that Received Retention Services but are no longer employed		
86	86								
0	0								
0				0	0				
6						0			
0									
<b>OTHER SUBTOTAL:</b>		92	86	0	0	0	0	0	
<b>GRAND TOTAL:</b>		see below	217	0	22	see below	see below	22	0
		217	293		via Recrt/Assess	0	22	22	
					via Career Pathway	0	22		

- 1.) Career Exploration:**  
 a.) Youth Apprenticeship  
 b.) Youth Internship  
 c.) Subsidized Work Experience  
 d.) Job Shadowing Opportunities  
 e.) Resume Development  
 f.) Career Planning Support
- 2.) Specialized Occupational Skills Training:**  
 a.) Short-Term/State-certified pre-employment training  
 b.) On the Job Training  
 c.) Customized Pre-Employment Training  
 d.) Incumbent and Workplace based Training
- 3.) Pre-Apprenticeship Tutoring**
- 4.) Placement Support**
- 5.) Retention Services**  
 ADJ for Participants receiving multiple services/training:

**NOTES:**  
 \*Assuming all of the above is correct, it would make sense service they receive. To avoid double-counting of a part service they receive.

**REFERENCES:**  
 \*(1) WRTP/Big Step to detail the number of **Opportunities**  
 \*(2) and (3) WRTP/Big Step to detail the number of **Jobs**

Table 1

	Q6	Q5	Q4	Q3	Q2	Q1	Totals
Milwaukee County Residents - Recruitment & Assessment:	<b>558</b>	389	396	337	340	492	2512
**Milwaukee County Residents - Career Pathway:	<b>123</b>	165	142	102	106	217	855
Placement in Employment:	<b>89</b>	103	162	74	31	44	503
<p><i>*These participants received the Ready-to-Work program's Recruitment and Assessment services (phase 1) are now receiving Career Pathway services and training (phase 2).</i></p>							

Table 2

<b><u>Milwaukee County Residents Placed in Employment</u></b>				
sub-1		<u>Construction</u>	<u>Manufacturing</u>	<u>Other (please define)</u>
	*Full-Time:	32	46	11
	*Part-Time or Seasonal:	0	0	0
	TOTAL:	32	46	11
<b>Construction</b>				
sub-2		<u>Private</u>	<u>County</u>	
	*Full-Time:	32	0	
	*Part-Time or Seasonal:	0	0	
	TOTAL:	32	0	
<b>Manufacturing</b>				
sub-3		<u>Private</u>	<u>County</u>	
	*Full-Time:	46	0	
	*Part-Time or Seasonal:	0	0	
	TOTAL:	46	0	
<b>Other (please define)</b>				
sub-4		<u>Private</u>	<u>County</u>	
	*Full-Time:	11	0	
	*Part-Time or Seasonal:	0	0	
	TOTAL:	11	0	

Table 1

## Quarterly Report 1

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
AUG 2012	\$ 32,868.50	\$ 9,225.50	\$ 42,094.00
SEPT 2012	\$ 34,155.84	\$ 10,144.47	\$ 44,300.31
OCT 2012	\$ 68,033.10	\$ 13,220.82	\$ 81,253.92
Q1 Total	\$ 135,057.44	\$ 32,590.79	\$ 167,648.23

## Quarterly Report 2

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
NOV 2012	\$ 41,099.49	\$ 11,627.35	\$ 52,726.84
DEC 2012	\$ 37,498.45	\$ 8,705.71	\$ 46,204.16
JAN 2013	\$ 54,520.35	\$ 11,542.72	\$ 66,063.07
Q2 Total	\$ 133,118.29	\$ 31,875.78	\$ 164,994.07

## Quarterly Report 3

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
FEB 2013	\$ 36,049.58	\$ 10,040.09	\$ 46,089.67
MARCH 2013	\$ 35,310.81	\$ 9,788.29	\$ 45,099.10
APRIL 2013	\$ 38,352.74	\$ 11,779.02	\$ 50,131.76
Q3 Total	\$ 109,713.13	\$ 31,607.40	\$ 141,320.53

## Quarterly Report 4

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
MAY 2013	\$ 85,610.34	\$ 14,425.47	\$ 100,035.81
JUNE 2013	\$ 41,985.36	\$ 17,114.14	\$ 59,099.50
JULY 2013	\$ 54,358.70	\$ 14,380.21	\$ 68,738.91
Q4 Total	\$ 181,954.40	\$ 45,919.82	\$ 227,874.22

## Quarterly Report 5

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
AUG 2013	\$ 38,107.95	\$ 7,276.76	\$ 45,384.71
SEPT 2013	\$ 32,977.29	\$ 7,196.28	\$ 40,173.57
OCT 2013	\$ 55,272.29	\$ 10,330.31	\$ 65,602.60
Q5 Total	\$ 126,357.53	\$ 24,803.35	\$ 151,160.88

## Quarterly Report 6

<u>Month</u>	<u>Direct</u>	<u>Indirect</u>	<u>Total</u>
NOV 13	\$ 43,712.14		\$ 43,712.14
DEC 13	\$ 37,249.30		\$ 37,249.30
JAN 14	\$ 82,852.02		\$ 82,852.02
Q6 Total	\$ 163,813.46	\$ -	\$ 163,813.46

<b>TOTALS</b>	<b>\$ 686,200.79</b>	<b>\$ 166,797.14</b>	<b>\$ 1,016,811.39</b>
---------------	----------------------	----------------------	------------------------

Table 2

Allowable Indirect Costs Per Agreement:	\$ 150,000
Allowable Indirect Costs in previous quarters:	\$ 141,993.79
Allowable Indirect Costs Incurred this Quarter:	\$ 24,803.35
Remaining Allowable Indirect Costs:	\$ (16,797.14)

*\*NOTE: Per the agreement (p. 8, Section 28), the outside auditing costs of \$50k or less, are not applied to the 15% indirect cost provision noted in Section 4 (p.2) of the agreement.*

**MILWAUKEE COUNTY**  
**Interoffice Memorandum**

DATE : February 25, 2014

TO: Marina Dimitrijevic, Chairwoman, Milwaukee County Board of Supervisors

FROM: Daniel J. Diliberti, Milwaukee County Treasurer 

RE: Intergovernmental Agreement with Wauwatosa regarding the liability and transfer of contaminated property

The attached resolution addresses an Intergovernmental Agreement with Wauwatosa. It provides for the transfer of property and holding harmless of Milwaukee County for any cleanup costs related to this contaminated property.

The agreement and extension agreement was approved by the Milwaukee County Corporation Counsel and approved by Wauwatosa.

Approval of this resolution would protect Milwaukee County's interests, allow for the transfer to this property to Wauwatosa for cleanup, resolve current delinquent tax shortfalls, end Milwaukee County's continuing delinquent property tax payments, and return this property to the tax rolls.

###

1 A RESOLUTION to approve the attached  
2 Intergovernmental Agreement and  
3 memorandum of understanding with the  
4 City of Wauwatosa to provide for the transfer of  
5 contaminated property and protect Milwaukee  
6 County's interests, resolve current delinquent tax  
7 shortfalls, end Milwaukee County's continuing  
8 delinquent property tax payments, and return  
9 this property to the tax rolls.  
10

11  
12 WHEREAS, The attached Intergovernmental agreement between Milwaukee County and the City of  
13 Wauwatosa addresses the transfer of property located at 2578 Wauwatosa Avenue to the City of  
14 Wauwatosa Community Development Authority and addresses the existing tax liens against that  
15 property; and  
16

17 WHEREAS, this long-vacated property is blighted, and environmentally impaired and the goal of the  
18 agreement is eliminate its status as a blighted property and return it to the tax rolls; and  
19

20 WHEREAS, Section 66.133 (13) of the Wisconsin Statutes authorizes the parties to enter into  
21 cooperative agreements and related contracts to eliminate blighted properties through redevelopment  
22 through the utilization of available public and private agencies and resources; and  
23

24 WHEREAS, the agreement stipulates that the county agrees to convey the property to the Wauwatosa  
25 Authority and the Authority agrees to accept the conveyance of the property; and  
26

27 WHEREAS, the County has foreclosed on the property in accordance with the terms of this agreement  
28 to enable it to transfer title under its authority; and  
29

30 WHEREAS, the county agrees to convey the property by warranty deed free and clear of all liens,  
31 except for two Wisconsin Department of Revenue warrants for \$1593.51; and  
32

33 WHEREAS, it is agreed upon that all taxes from the years 1992-1997 and 2002-2011 are considered  
34 uncollectable and the Authority accepts responsibility for the taxes for the year of the closing; and  
35

36 WHEREAS, this agreement is based upon the assumption that the Authority will take complete  
37 responsibility for any environmental remediation and forever discharges the County and its officers  
38 from any claims in any way connected with the environmental condition of the property; and  
39

40 WHEREAS, it is agreed upon that the Wauwatosa Authority will pursue sale of this property based  
41 upon an appraisal of this property and each party s entitle to reimbursement from the net proceeds  
42 after reimbursing the Authority for any of non-reimbursed remediation costs it incurred and then the  
43 county for unpaid delinquent property taxes prior to and including 2011 and the equal division of any  
44 remaining proceeds; now, therefore  
45

46 BE It Resolved that the attached Intergovernmental Agreement and Memorandum of Understanding  
47 between Milwaukee County and Wauwatosa are hereby affirmed and approved and the office of  
48 Economic Development is hereby authorized to proceed , under the direction of Corporation Counsel,  
49 with the conveyance of said property to the city of Wauwatosa Community Development Office,  
50 through the transfer of the title by Warranty Deed.

**MILWAUKEE COUNTY FISCAL NOTE FORM**

**DATE:** 2-25-14

Original Fiscal Note

Substitute Fiscal Note

**SUBJECT:** Intergovernmental Agreement, Wauwatosa – Collison property\_\_\_\_\_

**FISCAL EFFECT:**

- |  |  |
|--|--|
| <input type="checkbox"/> No Direct County Fiscal Impact  | <input type="checkbox"/> Increase Capital Expenditures |
| <input type="checkbox"/> Existing Staff Time Required  | <input type="checkbox"/> Decrease Capital Expenditures |
| <input type="checkbox"/> Increase Operating Expenditures<br>(If checked, check one of two boxes below) | <input type="checkbox"/> Increase Capital Revenues     |
| <input type="checkbox"/> Absorbed Within Agency's Budget   | <input type="checkbox"/> Decrease Capital Revenues     |
| <input type="checkbox"/> Not Absorbed Within Agency's Budget   |  |
| <input type="checkbox"/> Decrease Operating Expenditures   | <input type="checkbox"/> Use of contingent funds       |
| <input type="checkbox"/> Increase Operating Revenues   |  |
| <input checked="" type="checkbox"/> Decrease Operating Revenues  |  |

*Indicate below the dollar change from budget for any submission that is projected to result in increased/decreased expenditures or revenues in the current year.*

	<b>Expenditure or Revenue Category</b>	<b>Current Year</b>	<b>Subsequent Year</b>
<b>Operating Budget</b>	Expenditure	0	0
	Revenue	244,466	0
	Net Cost	0	0
<b>Capital Improvement Budget</b>	Expenditure		
	Revenue		
	Net Cost	0	0

## DESCRIPTION OF FISCAL EFFECT

In the space below, you must provide the following information. Attach additional pages if necessary.

- A. Briefly describe the nature of the action that is being requested or proposed, and the new or changed conditions that would occur if the request or proposal were adopted.
- B. State the direct costs, savings or anticipated revenues associated with the requested or proposed action in the current budget year and how those were calculated. <sup>1</sup> If annualized or subsequent year fiscal impacts are substantially different from current year impacts, then those shall be stated as well. In addition, cite any one-time costs associated with the action, the source of any new or additional revenues (e.g. State, Federal, user fee or private donation), the use of contingent funds, and/or the use of budgeted appropriations due to surpluses or change in purpose required to fund the requested action.
- C. Discuss the budgetary impacts associated with the proposed action in the current year. A statement that sufficient funds are budgeted should be justified with information regarding the amount of budgeted appropriations in the relevant account and whether that amount is sufficient to offset the cost of the requested action. If relevant, discussion of budgetary impacts in subsequent years also shall be discussed. Subsequent year fiscal impacts shall be noted for the entire period in which the requested or proposed action would be implemented when it is reasonable to do so (i.e. a five-year lease agreement shall specify the costs/savings for each of the five years in question). Otherwise, impacts associated with the existing and subsequent budget years should be cited.
- D. Describe any assumptions or interpretations that were utilized to provide the information on this form.

This resolution will not result in any new or additional expenditures, since the uncollectable delinquent taxes herein referred to have been carried on the books for many years, and with the contaminated condition of the property, there was no foreseeable way of collecting them.

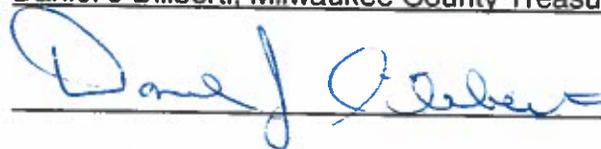
This resolution, along with its transfer to the City of Wauwatosa, will result in the discontinuation of the accumulation of any further delinquent taxes on this property.

This resolution will also result in the remediation of this property, and its return to the tax rolls with the added benefit of tax payments to the County by the new owner.

With the transfer of this property, the uncollectable delinquent taxes in the amounts of \$78,066.42 in principal, \$110,932.93 in interest, and \$55,466.44 in penalty will be written-off as a recognized loss of potential revenue, pending the sale of the property and the possible reimbursement of some of those uncollectable delinquent taxes from the sale of the property.

Department/Prepared By Daniel J Diliberti, Milwaukee County Treasurer

Authorized Signature



Did DAS-Fiscal Staff Review?  Yes  No

Did CBDP Review?<sup>2</sup>  Yes  No  Not Required

<sup>1</sup> If it is assumed that there is no fiscal impact associated with the requested action, then an explanatory statement that justifies that conclusion shall be provided. If precise impacts cannot be calculated, then an estimate or range should be provided.

<sup>2</sup> Community Business Development Partners' review is required on all professional service and public work construction contracts.

**INTERGOVERNMENTAL COOPERATION AGREEMENT  
REAL ESTATE ACQUISITION**

This Agreement made and entered into this 24 day of Aug. 2012, by and between COUNTY OF MILWAUKEE, Wisconsin ("County") and the COMMUNITY DEVELOPMENT AUTHORITY of the City of Wauwatosa ("Authority"), both municipal corporations:

**WITNESSETH:**

WHEREAS, the County has foreclosable tax liens pursuant to Section 75.521 of the Wis. Stats. against real property located at 2578 Wauwatosa Avenue in the City of Wauwatosa, Milwaukee County, Wisconsin, with tax identification numbers 331-0792-00 and 331-0793-00 ("Property"); and,

WHEREAS, the owner of record of the Property is Ronald L Collison, and,

WHEREAS, the Property is vacant, blighted and possibly environmentally impaired and the parties desire to cooperate for the purpose of eliminating its status as a blighted, environmentally impaired Property; and,

WHEREAS, Section 66.1333 (13) of the Wis. Stats. authorizes the parties to enter into cooperative agreements and related contacts to eliminate blighted properties through redevelopment and other activities through the utilization of all available public and private agencies and resources.

NOW THEREFORE, in consideration for the sum of one dollar (\$1.00) and other good and valuable consideration, the receipt which is acknowledged, and the mutual obligations of the parties in the premises, the County agrees to convey the Property to the Authority and the Authority agrees to accept conveyance of the Property from the County upon the following terms and conditions:

1. The County, subject to the environmental contingency described below, has begun the process to foreclose its tax liens against the Property pursuant to Section 75.521 of the Wis. Stats. and obtain title to the Property in fee simple absolute ("Tax lien foreclosure").
2. Conveyance of the Property to the Authority shall be closed at the office of the Corporation Counsel of the County, as soon as practicable on the day of the judgment of foreclosure, or at such other time and place as may be agreed in writing by the parties.
3. Conveyance of the Property shall be by warranty deed, free and clear of all liens and encumbrance, except as authorized under Section 75.521 (8) or (13)(b) of the Wis. Stats. and except for two delinquent warrants filed by the Wisconsin Department of Revenue and docketed in the office of the Clerk of the Circuit Court of Milwaukee County (No. 217057 on July 27, 1981 in the sum of \$ 1,152.76 and No. 232412 on April 8, 1983 in the sum of \$ 440.75)

4. Legal possession and occupancy of the Property shall be delivered to the Authority on the date of closing. (Defined term)
5. Time is of the essence with respect to the provisions of this Agreement.
6. It is agreed that all unpaid taxes and charges incurred by the County for the years 1992-1997, 2002-2011 (331-0792-00) and 1993, 1997, 2002-2011 (331-0793-00) are considered uncollectible ("Bad Debt"), and the Authority accepts financial responsibility for the taxes for the year of closing.
7. Environmental Contingency: The parties recognize that due to the past occupancy of the Property, there may exist conditions with respect to soils and groundwater on-site, including, but not limited to the presence of environmentally regulated pollutants, contaminants and hazardous or toxic materials that require investigation and, in some cases, remedial action and may result in claims, demands and liabilities to the owner of the Property by third parties, including, without limitation, governmental entities. Therefore, the parties have agreed that this Agreement is based upon the assumption that the Authority will take complete responsibility for any environmental remediation, subject to the following conditions:
  - a. Prior to the commencement of the tax lien foreclosure proceedings by the County, the Authority, its agents, employees and designees are hereby authorized by the County pursuant to Section 75.377 of the Wis. Stats. to enter upon the Property to conduct such environmental inspections, investigations and audits of the Property to determine the nature and extent of the environmental pollution as defined in Section 299.04 (4) of the Wis. Stats., to include removal of any underground storage tanks, if any. Such activities will be completed within one hundred twenty (120) days of the date of this Agreement and shall be conducted pursuant to and comply with all applicable statutes, rules and regulations.
  - b. If the City elects not to close or causes the agreement to be terminated due to the findings in paragraph a, above, the City agrees that it will provide such findings to the present owner of the property and the City of Wauwatosa Assessor, which is likely to have the effect of reducing the assessed value of the Property to \$100.00. Within thirty (30) days of the completion of the activities set forth in the Subsection a., above, the Authority shall have the right, in its sole and absolute discretion, elect to either close this transaction or cause this Agreement to be terminated by providing written notice to the County as to the Authority's intention. Failure to provide written notice to the County within the specified time herein shall also act to terminate this Agreement. If terminated as provided herein, this Agreement shall be null and void and neither party shall have any further obligations thereunder.
  - c. If the transaction contemplated herein closes, from and after the closing, the Authority waives, releases, acquits and forever discharges the County, its officers, employees and agents of and from and causes of action, legal or administrative proceedings, claims,

demands, actual damages, punitive damages, losses, costs, liabilities, interest attorney's fees and expenses of whatever kind and nature, in law or in equity, known or unknown, which the Authority ever had, now has, hereinafter can, shall or may have or acquire or possess or arising out for in any way connected with, or based upon the environmental condition of the Property.

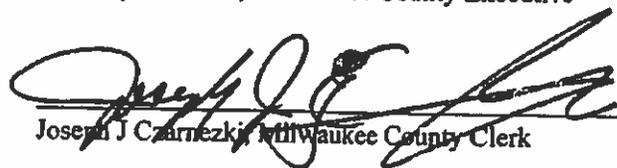
- d. Should the County be unable to obtain title to the Property or otherwise carry out this Agreement by reason of a valid legal defect in title which the Authority is unwilling to waive, this Agreement shall be void.
8. The parties agree to act in good faith and with diligence to conclude the transaction contemplated herein and to that end shall, without cost of expense to the other party, prepare, execute and deliver to or cause to be prepared, executed and delivered to the other party, such other and further instruments of transfer and conveyance as may be reasonably requested, and take such other action as the party may reasonably require to carry out more effectively their respective obligations under this Agreement.
9. It is agreed that the Authority will pursue the sale and use of the Property for development by a taxable private party at a sale price determined by the Authority based upon a fair market value appraisal of the property. In determining fair market value, the appraiser shall give consideration to the highest and best use of the Property.
10. Each party will be entitled to reimbursement from the net proceeds of the sale of the Property on the following basis:
  - a. Authority's Reimbursable Costs: Costs incurred for environmental investigation and clean-up of the Property, minus any reimbursement received under the brownfield/contaminated property remediation funding and grant money received therefore; Costs incurred for appraisal of the Property and other such costs associated with ownership of the property as shall be reasonably acceptable to the County.
  - b. County's Reimbursable Costs: All unpaid delinquent property taxes and charges against the Property for years prior to and including 2011.If the net proceeds of the sale of the Property are less than the total of those costs, the proceeds will be divided between the parties by first reimbursing the Authority for its costs, and providing the balance of said proceeds to the County to be applied against its costs, based upon the definitions of Reimbursable Costs of each party as described in the previous paragraph. If the proceeds of the sale are greater than the total of those Reimbursable Costs, the difference between the sale of the proceeds and the total of Reimbursable Costs will be divided equally between the parties.
11. This Agreement contains the entire agreement between the parties and any agreement hereafter made shall be ineffective to change, modify or discharge this Agreement, in whole or in part, unless such agreement hereafter made is in writing and signed by the parties hereto.

\*\*\*\*\*

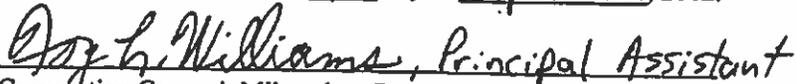
IN WITNESS WHEREOF, the parties have caused this Agreement to be duly executed and delivered as of the date first above written.

**County of Milwaukee**

BY:   
Christopher Abele, Milwaukee County Executive

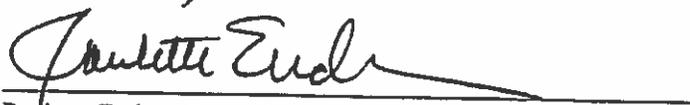
ATTEST:   
Joseph J. Czarnetzki, Milwaukee County Clerk

Approved as to form of this 7<sup>th</sup> day of September, 2012.

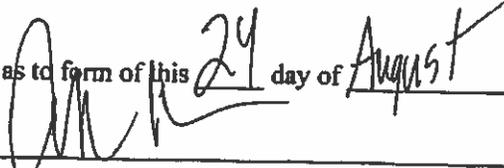
  
Joseph L. Williams, Principal Assistant  
Corporation Counsel, Milwaukee County

**Community Development Authority  
City of Wauwatosa**

BY:   
Jason Kohout, Chairman

ATTEST:   
Paulette Enders, Executive Director

Approved as to form of this 24 day of August, 2012.

  
Alan Kesney, City Attorney, City of Wauwatosa

**MEMORANDUM OF UNDERSTANDING  
REAL ESTATE ACQUISITION**

This Memorandum of Understanding (this "MOU") is dated as of the 13 day of December, 2013, by and between MILWAUKEE COUNTY ("County") and the COMMUNITY DEVELOPMENT AUTHORITY of the City of Wauwatosa ("Authority"), both municipal corporations. Together these named entities constitute the "Parties" to this MOU.

**WITNESSETH:**

**WHEREAS**, the County and the Authority are Parties to that certain Intergovernmental Cooperation Agreement (the "Agreement") dated AUGUST 24, 2012 (*provided as attachment 'A'*), pursuant to which the Parties are to cooperate for the purpose of eliminating blighted and environmentally impaired real property located at 2578 Wauwatosa Avenue in the City of Wauwatosa, with tax identification numbers 331-0792-00 and 331-0793-00 ("Property"); and

**WHEREAS**, the Agreement permits the Authority to enter upon the Property to conduct environmental inspections and investigations, and audits of the Property to determine the nature and extent of the environmental pollution; and

**WHEREAS**, the Agreement also gives the authority the discretion to either accept legal possession and occupancy of the Property or cause the Agreement to be terminated by providing written notice to the County as to the Authority's intentions.

**NOW THEREFORE**, in consideration of the terms and provisions contained herein and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged by the Parties hereto, it is agreed as follows:

**PROVISIONS:**

1. The County shall continue the process to foreclose its tax liens against the Property pursuant to Section 75.521 of the Wis. Stats., and obtain title to the Property in fee simple absolute.
2. The Authority acknowledges and agrees it wants legal possession and occupancy of the Property.
3. The Agreement is renewed and the County waives the thirty (30) day notice requirement contained in Paragraph 7.b. of the Agreement.
4. All other terms and provisions of the Agreement shall remain in full force and effect.
5. In the event of any conflict between the terms and provisions of this MOU and the terms and provisions of the Agreement, the terms and provisions of this MOU shall govern, control and prevail.

IN WITNESS WHEREOF, the Parties have executed this Memorandum of Agreement as of the date first set forth above.

County of Milwaukee

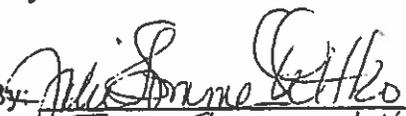
By:  Date: 12/20/17  
Christopher Abele, Milwaukee County Executive

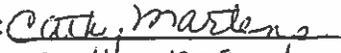
Attest:  Date: 12/17/2013  
Joseph J. Czarnecki, Milwaukee County Clerk

*Approved as to form and independent status:*

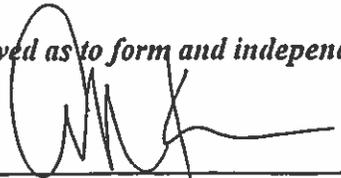
By:  Date: 12/13/13  
Corporation Counsel, Milwaukee County

Community Development Authority  
City of Wauwatosa

By:  Date: 12/13/13  
Name: Julie Tomma Kettko  
Title: CDA Chairperson

Attest:  Date: 12/12/13  
Name: Cathy Martens  
Title: Municipal Clerk

*Approved as to form and independent status:*

By:  Date: 12/13/13  
Alan Kesner, City Attorney, City of Wauwatosa



Community Business Development Partners

# MILWAUKEE COUNTY

RICK NORRIS, PE • Director, DBE Liaison Officer, ACDBE Liaison Officer

3

## INTER-OFFICE COMMUNICATION

DATE: March 17, 2014

TO: Supervisor Patricia Jursik, Chair, Economic & Community Development Committee  
Supervisor Michael Mayo, Sr., Chair, Transportation, Public Works & Transit Committee

FROM: Rick Norris, PE, Director, Community Business Development Partners

SUBJECT: DBE WAIVER REPORT FOR FEBRUARY OF 2014

### DIRECTIVE

At the request of the Committee on Economic and Community Development, the Community Business Development Partners Department (CBDP) provides a monthly update on the Disadvantaged Business Enterprise (DBE) utilization waivers requested by, and granted to, Milwaukee County departments/divisions.

### BACKGROUND

CBDP is responsible for designing, implementing, monitoring and enforcing Milwaukee County's DBE Program in order to maintain compliance with Federal Regulations and Milwaukee County Ordinances. Implementation of the Program includes assignment of participation goals on, both, Federal and County funded contracts, as well as monitoring and enforcing compliance of these contracts. Participation goals may only be established on contracts where opportunities exist for ready, willing and able certified firms to perform commercially useful functions related to the satisfaction of those contracts.

In 1999, the United States Department of Transportation (USDOT) implemented DBE Program rules with seven (7) key objectives directed at creating a level playing field on which certified firms could compete fairly for USDOT-assisted contracts. This legislation, 49 CFR Parts 23 and 26, requires all recipients of USDOT funds to establish and maintain a DBE program that, not only, complies with the intent and language of the legislation, but that has also been reviewed and approved by USDOT. As a result of public and private stakeholder input, Milwaukee County determined and approved, by action of the County Executive and the full County Board, to establish and maintain a program based upon the Federal DBE Program rules and standards for all of its contracts. This action designed to ensure the same level of commitment and consistency in approach to the facilitation of small business involvement when and where appropriate has been enacted in Chapter 42 of the Milwaukee County Code of General Ordinances.

Milwaukee County is required to provide and establish contract opportunities for certified firms on its projects based upon the number of ready, willing and able firms certified to perform within the scope(s) of each of these projects. Only firms certified through Wisconsin's Unified Certification Program (UCP), a consortium of over 24 municipalities and agencies throughout the State, count as ready, willing and able firms for this purpose. Four of the UCP members serve as certifying partners for the consortium, Milwaukee County, WisDOT, Dane County, and the City of Madison. Milwaukee County has the responsibility of verifying and maintaining the certification status of 355 of the 845 currently certified firms throughout the State, while processing all new applications for DBE certification.

WAIVER REQUESTS

When CBDP receives a waiver request from a department/division, staff thoroughly reviews it and available supporting documentation before rendering a determination. The Interim Director may require staff to gather more comprehensive information or to provide more detailed clarification regarding any identified issues prior to issuing a determination.

WAIVER REPORT SUMMARY

The figures below include Professional & Management Service and Capital Improvement/Maintenance contracts awarded during February of 2014. This report does not include contracts awarded by the Procurement Division of the Department of Administrative Services processes under Chapter 32. Please see the attachment for waivers requested as broken out by owner department, contractor/consultant awarded, scope of services rendered, total contract amounts, and reason for approval.

<b>Total Contracted Dollars for Period</b>	<b>\$ 11,160,536.00</b>
<b>Total Contracted Dollars w/o DBE Participation</b>	<b>\$ 4,729,214.80</b>
<b>Percentage of Contracts w/o DBE Participation</b>	<b>42.4%</b>
<b>Total Contracted Dollars w/ Waiver Approval</b>	<b>\$ 4,724,214.80</b>
<b>Percentage of Contracts w/ Waiver Approval</b>	<b>42.3%</b>
<b>Total Contracted Dollars w/o Waiver Approval</b>	<b>\$ 0.00</b>
<b>Percentage of Contracts w/o Waiver Approval</b>	<b>0.0%</b>

It is also important to note that the Milwaukee County Code of General Ordinances exempts various contracts from DBE participation consideration review for services such as those used for the purpose of securing credit rating services related to debt issuance and administration. These exemptions appear as Chapter 56.30(2)(a), and 56.30(10)(a).

<b>Total Contracted Dollars for Period</b>	<b>\$ 11,160,536.00</b>
<b>Total Exempted Contract Dollars</b>	<b>\$ 5,000.00</b>
<b>Percentage of Exempted Contracts for Period</b>	<b>0.0%</b>

RECOMMENDATION

CBDP prepared this informational report, and recommends that it be received and filed, as such.

Approved by:



Rick Norris, PE  
Director, CBDP

CC: Chris Abele, Milwaukee County Executive

# Milwaukee County Community Business Development Partners Department (CBDP) DBE Waiver Report February 2014

DEPARTMENT	CONSULTANT/CONTRACTOR	SCOPE OF SERVICES	CONTRACT AMOUNT	APPROVAL REASON
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### Approved Waivers <sup>1</sup>

Milwaukee County Zoo	Zoological Gardens	Parking plus memberships	2,162,426.70	
County Funded State Court Service	Legal Aid Society	To provide legal representation for guardian ad litem	1,844,000.00	Legal Services
Milwaukee County Zoo	Oceans of Fun, Inc.	Sea Lion show	160,000.00	Specialized Service
County Funded State Court Service	State of Wisconsin	To continue the operation of the Legal Resource Center	139,829.00	Specialized Service
MCSO	ACL Services, Inc.	Pre and post employment alcohol and drug testing	83,159.10	Specialized Service
Dept. on Aging	Project Focal Point, Inc.	Programs in Minority Senior Centers	60,000.00	Specialized Service
DOT-GMIA	Anderson & Kreiger, LLP	Professional service for work relating to fuel consortium matters	50,000.00	Specialized Service
DOT-GMIA	Jones Lang LaSalle	Real estate advisory service to MC for a market study on GMIA	45,000.00	Specialized Service
DAS Office For Persons With Disabilities	Various Interpreters	Sign language interpreter services	38,000.00	Specialized Services
Dept. on Aging	Asian American Community Center, Inc.	Services to Asian American Elderly	37,500.00	Specialized Service
County Funded State Court Service	IMPACT Planning Council	Substance abuse treatment program for women	35,690.00	Specialized Service
County Funded State Court Service	State of WI State Law Library	To order, receive, catalog and set up each judge and central resources library	35,000.00	Specialized Service
County Funded State Court Service	DNA Diagnostics Center, Inc.	Provide lab services to Children's Court Center	15,000.00	Specialized Service
DOT - Airports	James G Otto Architect	GMIA - South Maintenance Office Remodel	8,500.00	Annual Consultant Utilization
District Attorney	Anthony M. Jurek, Ph.D	Conduct a forensic evaluation	4,000.00	Specialized Service
DOT-GMIA	Smith Amundsen, LLC	To assist with the analysis of specialized risk management and insurance issues	3,000.00	Specialized Service
County Funded State Court Service	META House	To facilitate a voluntary process group for the participants of the Family Drug Treatment Court	2,810.00	Specialized Service
Parks	CTM Group, Inc.	Penny Press Vending Machine	500.00	Under \$2,000.00

### Contracts Issued Without Review <sup>2</sup>

None

### Exempted Contracts <sup>3</sup>

Comptroller	U.S. Bank	US Bank administration fees for the 2003A, 2007A, 2009A, 2006A&B, 2005A&B, airport bonds	5,000.00	
<b>Total Contract \$ Amount for Period <sup>4</sup></b>			<b>\$11,160,536.00</b>	
<b>Total Contract \$ Amount w/o DBE Participation for Period</b>			<b>4,729,214.80</b>	
<b>Percentage w/o DBE Participation</b>			<b>42.4%</b>	
<b>Total Approved Waiver \$ Amount</b>			<b>\$4,724,214.80</b>	
<b>Percentage Waived</b>			<b>42.3%</b>	
<b>Total Unapproved Waiver \$ Amount</b>			<b>0.00</b>	
<b>Percentage w/o Waiver Approval</b>			<b>0.0%</b>	
<b>Total Exempted \$ Amount</b>			<b>5,000.00</b>	
<b>Percentage Exempted</b>			<b>0.0%</b>	

<sup>1</sup> Waivers approved by CBDP; within guidelines of Code of General Ordinances

<sup>2</sup> Contracts issued by Departments in violation of the Code of General Ordinances;  
CBDP is made aware of these projects when Accounts Payable forwards new contract information

<sup>3</sup> These contracts are exempted from Disadvantaged Business Enterprise participation review within the guidelines of Code of General Ordinance Chapter 56.30(2)(a) such as those used for the purpose of securing credit rating services related to debt issuance and administration

<sup>4</sup> Total does not include Procurement Division Figures

**COUNTY OF MILWAUKEE  
INTEROFFICE COMMUNICATION**

**DATE:** February 12, 2014

**TO:** County Executive Chris Abele  
Milwaukee County Board Chairwoman Marina Dimitrijevic  
Willie Johnson Jr., Co-Chair, Committee on Finance, Personnel, & Audit  
David Cullen, Co-Chair, Committee on Finance, Personnel, & Audit

**FROM:** Don Tyler, Director, Department of Administrative Services  
Ruben Anthony, Director, Interim Director, Community Business Development Partners

**SUBJECT: NOTIFICATION OF A REVENUE DEFICIT FOR 2013 & 2014  
(FOR INFORMATION ONLY)**

**ISSUE**

Milwaukee County Ordinance 56.02 requires department administrators to submit a report to the County Executive, Committee on Finance, Personnel, & Audit, and the Department of Administrative Services when potential revenue deficits of \$75,000 or more are identified.

**BACKGROUND**

**2013**

The 2013 Adopted Budget for Community Business Development Partners (CBDP) included operating (crosscharge) revenue of approximately \$158,000 for DBE work performed in relation to capital projects. The budgeted revenue assumed that four CBDP staff would be charging capital projects beginning April 1.<sup>1</sup> This included staff time that was pro-rated for sick and vacation time and included three positions (two Contract Specialists and one Contract Compliance Manager) working primarily on capital projects and one position (Information and Outreach Coordinator) working about 10% of the time on capital projects.

Additionally, the County's Bond Counsel provided a review of the capital projects to be charged to avoid any potential (U.S Treasury and Wisconsin State Statute) compliance issues. As a result of this review, Bond Counsel determined that projects financed with General Obligation (GO) bonds or General Airport Revenue bonds (GARBs) could only be worked on by CBDP staff after a contract had been signed/executed. The vast majority of the County's capital projects are, at least in part, financed with bond proceeds. When the

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<sup>1</sup> **2013 Adopted Budget Language for CBDP:** Staffing costs of \$158,236 are charged to the Capital Improvement program for 2013. CBDP will develop a methodology for tracking of staffing charged to capital to be implemented no later than April 1, 2013. The methodology will be reviewed and approved by the Comptroller's Office prior to implementation. Final staff charges will be based upon actual work performed.

*NOTE: Charging methodology developed by CBDP (with assistance from DAS-PSB) was reviewed and approved by the Comptroller Office prior to the related June, 2013 fund transfer.*

2013 Budget was developed the (U.S Treasury and Wisconsin State Statute) rules of charging CDBP staff time to bond financed capital projects were not known. These constraints narrowed the amount of staff time available to be charged out to bond financed capital projects by CDBP.

Although CDBP's 2013 budget assumed that four staff would be working on DBE-related issues for capital projects, only about 1 – 2 staff actually worked on these projects. Additionally, the CDBP staff compliance responsibilities were greater than the scope of the projects that were identified for cross charging and work on these additional projects were not eligible to be crosscharged.

Finally, a fund transfer was required in order to establish budget authority in the capital budget to enable CDBP to crosscharge (eligible) capital projects. The fund transfer occurred in the June 2013 committee cycle. As a result, CDBP staff began working on the related capital projects in June instead of April.

### **CORRECTIVE ACTION PLAN**

#### **2013**

CDBP staff began charging (eligible) capital projects in June. Initial consolidation of CDBP crosscharges occurred in November/December with final revenue estimates determined in January (2014). As a result, the revenue deficit was not fully realized until January. As a result, options for offsetting the impact do not exist since the full extent of the deficit wasn't known until year-end. The revenue deficit will ultimately be absorbed by the anticipated 2013 overall County surplus.<sup>2</sup>

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### **BACKGROUND**

#### **2014**

The 2014 Adopted Budget for CDBP includes operating (crosscharge) revenue of approximately \$181,000 for DBE work performed in relation to capital projects. Similar to 2013, it is likely that the 2014 budgeted revenue of \$181,000 will not be achieved.<sup>3</sup> As noted previously, actual revenue amounts for 2013 were not fully known until January 2014. The 2014 County Executive Recommended Budget was developed over the summer and submitted to the County Board in late September. As result, the 2014 crosscharge revenue of \$181,000 was not adjusted down since the actual 2013 revenue shortfall was not known until after the 2014 Budget was adopted.

<sup>2</sup> During the January 2014 standing committee cycle, the Comptroller's "Monthly Update of the 2013 Fiscal Projection of Milwaukee County" report indicated an estimated County surplus of \$14.3 million. *Milwaukee County Board File #14-114.*

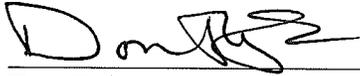
<sup>3</sup> **2014 Adopted Budget Language for CDBP:** Continuing the initiative started in 2013, four positions will charge time to capital projects in 2014.

**CORRECTIVE ACTION PLAN**

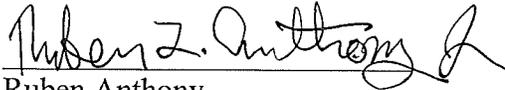
**2014**

CBDP will attempt to mitigate the anticipated 2014 revenue deficit by the following:

- a. As a number of eligible projects have already been identified (via the 2013 review process), CBDP staff can work on the projects immediately in 2014 (as opposed to 2013 where staff started working and charging capital projects in June).
- b. The 2014 adopted budget assumed four staff to be working on eligible capital projects. CBDP will augment these four positions by assigning two additional staff to work on eligible capital projects.
- c. CBDP will monitor the crosscharge revenue on a monthly basis in order to determine YTD revenue and project year-end revenue.



Don Tyler  
Director, Department of Administrative Services



Ruben Anthony  
Director, Interim Director, Community Business Development Partners

cc: Amber Moreen, Chief of Staff, County Executive's Office  
Scott Manske, Comptroller  
Josh Fudge, Fiscal & Budget Administrator, Department of Administrative Services  
Kelly Bablitch, Chief of Staff, County Board



Community Business Development Partners  
**MILWAUKEE COUNTY**

Rick Norris, PE, Director, DBE Liaison Officer, ACDBE Liaison Officer

**COUNTY OF MILWAUKEE**  
 INTEROFFICE COMMUNICATION

**Date:** March 28, 2014

**To:** Supervisor Patricia Jursik, Chair, Economic & Community Development Committee  
 Supervisor Michael Mayo, Sr., Chair, Transportation, Public Works & Transit Committee

**From:** Rick Norris, PE, Director, Community Business Development Partners (CBDP)

**Subject:** Update on Micro Loan Program

**Background:**

The Committee on Economic and Community Development, at its March 10, 2014 meeting, considered File No. 14-136 (update on CBDP outreach including the Microloan Fund, Revolving Loan Fund and educational seminars). As reported at the committee the Microloan Program will be managed and serviced by three primary providers:

1. **Processing, Approvals and Administrative Services.** CBDP will be taking on the primary responsibilities related to the processing, approval and servicing of the loans;
2. **Underwriting and Analysis.** Lincoln Opportunity Fund, LLC will perform the underwriting analysis;
3. **Custodial Services.** Microloan funds will be deposited and held at Tri-City National Bank Corporation, a wholly owned banking subsidiary of Tri-City Bankshares, Inc. a single bank holding company headquartered in Oak Creek, WI-based financial institution.

This approach allows us to get the program underway in the most efficient and economical way for those DBE firms benefiting from the program.

As a follow up to the March report, Supervisor Mayo, Sr., requested that CBDP ask the Risk Management Division to examine this program.

**Update:**

The CBDP and Risk have had an initial meeting and will continue to identify best practices. CBDP will also be meeting with Corporation Counsel, the Comptroller's Office and Audit to receive input regarding the procedures and process of the Micro Loan Program. Additionally, in anticipation of the mid-April early May rollout, CBDP met with various organizations that perform loan application services to get an idea of how the process works. Our findings revealed that many of these organizations use a software program called "Down Home Loan Manager" to service the loans. Down Home Loan Manager is an industry standard software package that performs all the essential financial reporting needed to service loans.

It is anticipated that CBDP will service the loans using the Down Home Loan Manager software. The Applicant Review Committee is comprised of a three person panel from the following DAS divisions: CBDP, Risk Management and IMSD

Approved by:



Rick Norris, PE  
Director, CBDP

cc: Chris Abele, County Executive  
Amber Moreen, Chief of Staff, County Executive  
Don Tyler, Director of Administrative Services  
Kelly Bablitch, Chief of Staff, Milwaukee County Board of Supervisors  
Amy Pechacek, Director, Risk Management  
Raisa Koltun, Director of Legislative Affairs, Co. Exec's Ofc  
Josh Fudge, Director, PSB  
Chris Lindberg, Director of IMSD

**COUNTY OF MILWAUKEE**  
INTEROFFICE COMMUNICATION

6

DATE: March 28, 2014

TO: Supervisor Marina Dimitrijevic, Chairwoman, County Board of Supervisors

FROM: Teig Whaley-Smith, Economic Development Director, Department of Administrative Services

SUBJECT: The Director of the Department of Administrative Services – Economic Development recommends authorization to apply for, and if awarded, accept and implement a Community Development Investment Grant from the Wisconsin Economic Development Corporation in an amount up to \$250,000 to assist in funding streetscaping improvements for the expansion of Milwaukee’s Asian Market Phongsavan.

**POLICY**

Milwaukee County Board review and approval is required for the submission of grant funding applications, pursuant to MCGO 56.06.

**BACKGROUND**

The Wisconsin Economic Development Corporation (WEDC) is the State of Wisconsin’s lead economic development agency focused on sustainable business growth and job creation. The economic development resources WEDC provides to local governments and private parties are numerous and include several grant opportunities. One such opportunity is the Community Development Investment Grant (CDIG) Program. This program is meant to, “support urban, small city and rural community redevelopment efforts by providing financial incentives for shovel-ready projects with emphasis on, but not limited to, downtown community driven efforts,” by providing grants to local municipalities for use on specific projects which “demonstrate significant, measureable benefits in job opportunities, property values and/or leveraged investment by local and private partners.”

DAS-Economic Development is seeking authorization to apply for a Tier 2 CDIG in an amount up to \$250,000 to assist in the redevelopment and expansion of Milwaukee’s Asian Market Phongsavan. Milwaukee’s Asian Market Phongsavan is located on the northwest side of the City of Milwaukee at 6300 N. 76<sup>th</sup> Street. Opened in 2008 in a former blighted and abandoned auto repair building, the market features groceries, produce, a café and 30 vendor stalls providing an assortment of goods including fruits, vegetables and Hmong cultural items. To accommodate the massive growth and demand of the current market, Milwaukee’s Asian Market Phongsavan began planning a new two-story building adjacent to the existing structure that would provide not only new vendor stalls, but restaurants, medical offices and an assortment of other services that could benefit the community, including basketball courts and community halls. The new venue would be approximately 70,582 square feet and feature 160 rentable spaces in a variety of sizes. To date, the majority of the new building has been pre-leased. Upon completion of the new building, the existing 14,000 square foot structure will be converted solely into grocery store.

Milwaukee's Asian Market Phongsavan's expansion project will cost approximately \$4.1 million. The majority of the project is funded through a \$3,346,300, 75% SBA-backed loan serviced by Ridgestone Bank. The unguaranteed 25% of the loan consists of \$418,281 MEDC participation and \$418,294 Ridgestone Bank participation. Owner equity and WEDC grant funds will be used to cover the remaining project costs. WEDC grant funds would be used specifically for streetscaping improvements, including but not limited to landscaping, signage, storefront windows, doors and awnings. These improvements would be made to the existing building as well as the new building, ensuring a cohesive and inviting professional appearance.

The CDIG requires a local 75% match. Match funds need not be from the County, but can come from private investment into the project. In this case, the SBA Note, MEDC loan and owner equity constitute eligible matching funds. Because a grant of \$250,000 constitutes roughly 6% of total project costs, the match requirement has been more than satisfied.

To implement the grant, if awarded, DAS-Economic Development will enter into a Development Agreement with Milwaukee's Asian Market Phongsavan, with terms including, but not limited to the following:

- DBE participation pursuant to Ch. 42 for the portion of the project funded by the grant;
- Goal of 25% residential hiring for the portion of the project funded by the grant;
- Good faith efforts to utilize workers from Milwaukee JobCorps where possible on the entire project;
- Submittal to County of paid itemized invoices for eligible expenses with proof of payment for reimbursement purposes, as required by WEDC;
- Semi-annual performance reporting during the life of the project, with a final report due upon completion, as required by WEDC;
- Reporting for the next several years regarding job creation and retention, leveraged investment, project specific gains and the increase in the tax base, as required by WEDC;
- Indemnification in favor of County in the event of a default entitling WEDC to a return of any grant funds expended;
- Guaranty that County is not responsible for financial obligations of Milwaukee's Asian Market Phongsavan, including but not limited to loan default by the principal;
- Access to project records during the life of the project and for at least three years thereafter for auditing purposes.

## **RECOMMENDATION**

The Director of the Department of Administrative Services – Economic Development recommends authorization to apply for, and if awarded, accept and implement a Community Development Investment Grant from the Wisconsin Economic Development Corporation in an amount up to \$250,000 to assist in funding streetscaping improvements for the expansion Milwaukee's Asian Market Phongsavan.

**FISCAL NOTE**

Acceptance of the grant will have a net zero impact on the division's budget. Milwaukee County's role in the process will be that of a compliance administrator and conduit for grant funds. Staff time to monitor the project and process the reimbursements will be absorbed in the agency's existing budget.

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Teig Whaley-Smith

Economic Development Director, Department of Administrative Services

cc: Chris Abele, County Executive  
Supervisor Patricia Jursik, Chair, Economic & Community Development Committee (ECD)  
Supervisor Willie Johnson, Jr., Chair, Finance, Personnel & Audit Committee (FPA)  
Supervisor David Cullen, Chair, Finance, Personnel & Audit Committee (FPA)  
Supervisor David Bowen, Vice Chair, ECD Committee  
Supervisor Michael Mayo, Sr., ECD Committee  
Supervisor James (Luigi) Schmitt, ECD Committee  
Supervisor Steve F. Taylor, ECD Committee  
Supervisor Khalif Rainey ECD Committee  
Supervisor Jason Haas, Vice Chair, FPA Committee  
Supervisor James "Luigi" Schmitt, FPA Committee  
Supervisor Romo West, FPA Committee  
Supervisor Theodore, Lipscomb, Sr. FPA Committee  
Supervisor Russell Stamper, II, FPA Committee  
Don Tyler, Director, Department of Administrative Services  
Amber Moreen, Chief of Staff, Office of the County Executive  
Kelly Bablitch, Chief of Staff, County Board of Supervisors  
Raisa Koltun, Director of Legislative Affairs, County Executive's Office  
Julie Esch, Director of Operations, DAS  
Steve Cady, Research & Policy Director, Comptroller's Office  
Jessica Janz-McKnight, Research Analyst, Comptroller's Office  
Jill Suurmeyer, Research Analyst, Comptroller's Office

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3  
4 (ITEM ) The Director of the Department of Administrative Services – Economic  
5 Development recommends authorization to apply for, and if awarded, accept and  
6 implement a Community Development Investment Grant from the Wisconsin Economic  
7 Development Corporation in an amount up to \$250,000 to assist in funding  
8 streetscaping improvements for the expansion of Milwaukee’s Asian Market  
9 Phongsavan.

10  
11 **A RESOLUTION**  
12

13 WHEREAS, the Wisconsin Economic Development Corporation (WEDC) is the  
14 State of Wisconsin’s lead economic development agency focused on sustainable  
15 business growth and job creation; and  
16

17 WHEREAS, WEDC’s Community Development Investment Grant (CDIG)  
18 Program is meant to, “support urban, small city and rural community redevelopment  
19 efforts by providing financial incentives for shovel-ready projects with emphasis on, but  
20 not limited to, downtown community driven efforts,” by providing grants to local  
21 municipalities for use on specific projects which “demonstrate significant, measureable  
22 benefits in job opportunities, property values and/or leveraged investment by local and  
23 private partners.”; and  
24

25 WHEREAS, DAS-Economic Development is seeking authorization to apply for a  
26 Tier 2 CDIG in an amount up to \$250,000 to assist in the redevelopment and expansion  
27 of Milwaukee’s Asian Market Phongsavan; and  
28

29 WHEREAS, Milwaukee’s Asian Market Phongsavan, located on the northwest  
30 side of the City of Milwaukee at 6300 N. 76<sup>th</sup> Street opened in 2008 in a former blighted  
31 and abandoned auto repair building and features groceries, produce, a café and 30  
32 vendor stalls providing an assortment of goods including fruits, vegetables and Hmong  
33 cultural items; and,  
34

35 WHEREAS, to accommodate the massive growth and demand of the current  
36 market, Milwaukee’s Asian Market Phongsavan began planning a new two-story  
37 building adjacent to the existing structure that would provide not only new vendor stalls,  
38 but restaurants, medical offices and an assortment of other services that could benefit  
39 the community, including basketball courts and community halls; and,  
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41 WHEREAS, the new venue would be approximately 70,582 square feet and  
42 feature 160 rentable spaces in a variety of sizes, the majority of which have already  
43 been pre-leased.  
44

45 WHEREAS, upon completion of the new building, the existing 14,000 square  
46 foot structure will be converted solely into grocery store; and  
47

48 WHEREAS, Milwaukee’s Asian Market Phongsavan’s expansion project will cost  
49 approximately \$4.1 million, funded primarily through a \$3,346,300, 75% SBA-backed  
50 loan serviced by Ridgestone Bank with \$418,281 MEDC participation.

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WHEREAS, owner equity and WEDC grant funds will be used to cover the remaining project costs; and

WHEREAS, WEDC grant funds would be used specifically for streetscaping improvements on both the existing building and the new building, including but not limited to landscaping, signage, storefront windows, doors and awnings.

WHEREAS, the required 75% local match requirement is satisfied by the \$3,346,000 loan and owner equity, which account for approximately 94% of project costs; now, therefore,

BE IT RESOLVED that the Director for Economic Development Division is hereby authorized to apply for, and if awarded, accept CDIG funds in an amount not to exceed \$250,000 from the Wisconsin Economic Development Corporation to pay for streetscaping improvements for the expansion of Milwaukee's Asian Market Phongsavan; and

BE IT FURTHER RESOLVED, that if awarded the grant DAS-Economic Development is authorized to enter into a CDIG Agreement with WEDC and a Development Agreement with Milwaukee's Asian Market Phongsavan, subject to the approval of Risk Management and Corporation Counsel; and

BE IT FURTHER RESOLVED, the Development Agreement shall include at least the following terms and conditions:

- (a) DBE participation pursuant to Ch. 42 for the portion of the project funded by the grant;
- (b) Goal of 25% residential hiring for the portion of the project funded by the grant;
- (c) Good faith efforts to utilize workers from Milwaukee JobCorps where possible on the entire project;
- (d) Submittal to County of paid itemized invoices for eligible expenses with proof of payment for reimbursement purposes, as required by WEDC;
- (e) Semi-annual performance reporting during the life of the project, with a final report due upon completion, as required by WEDC;
- (f) Reporting for the next several years regarding job creation and retention, leveraged investment, project specific gains and the increase in the tax base, as required by WEDC;
- (g) Indemnification in favor of County in the event of a default entitling WEDC to a return of any grant funds expended;
- (h) Guaranty that County is not responsible for financial obligations of Milwaukee's Asian Market Phongsavan, including but not limited to loan default by the principal;
- (i) Access to project records during the life of the project and for at least three years thereafter for auditing purposes.

## MILWAUKEE COUNTY FISCAL NOTE FORM

**DATE:** March 28, 2014

Original Fiscal Note

Substitute Fiscal Note

**SUBJECT:** The Director of the Department of Administrative Services – Economic Development recommends authorization to apply for, and if awarded, accept and implement a Community Development Investment Grant from the Wisconsin Economic Development Corporation in an amount up to \$250,000 to assist in funding streetscaping improvements for the expansion of Milwaukee’s Asian Market Phongsavan.

**FISCAL EFFECT:**

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> No Direct County Fiscal Impact<br><input checked="" type="checkbox"/> Existing Staff Time Required<br><input type="checkbox"/> Increase Operating Expenditures<br>(If checked, check one of two boxes below)<br><input type="checkbox"/> Absorbed Within Agency’s Budget<br><input type="checkbox"/> Not Absorbed Within Agency’s Budget<br><input type="checkbox"/> Decrease Operating Expenditures<br><input type="checkbox"/> Increase Operating Revenues<br><input type="checkbox"/> Decrease Operating Revenues | <input type="checkbox"/> Increase Capital Expenditures<br><input type="checkbox"/> Decrease Capital Expenditures<br><input type="checkbox"/> Increase Capital Revenues<br><input type="checkbox"/> Decrease Capital Revenues<br><input type="checkbox"/> Use of contingent funds |
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*Indicate below the dollar change from budget for any submission that is projected to result in increased/decreased expenditures or revenues in the current year.*

	Expenditure or Revenue Category	Current Year	Subsequent Year
<b>Operating Budget</b>	Expenditure	N/A	N/A
	Revenue	N/A	N/A
	Net Cost	0	0
<b>Capital Improvement Budget</b>	Expenditure	0	0
	Revenue	0	0
	Net Cost	0	0

## DESCRIPTION OF FISCAL EFFECT

In the space below, you must provide the following information. Attach additional pages if necessary.

- A. Briefly describe the nature of the action that is being requested or proposed, and the new or changed conditions that would occur if the request or proposal were adopted.
- B. State the direct costs, savings or anticipated revenues associated with the requested or proposed action in the current budget year and how those were calculated. <sup>1</sup> If annualized or subsequent year fiscal impacts are substantially different from current year impacts, then those shall be stated as well. In addition, cite any one-time costs associated with the action, the source of any new or additional revenues (e.g. State, Federal, user fee or private donation), the use of contingent funds, and/or the use of budgeted appropriations due to surpluses or change in purpose required to fund the requested action.
- C. Discuss the budgetary impacts associated with the proposed action in the current year. A statement that sufficient funds are budgeted should be justified with information regarding the amount of budgeted appropriations in the relevant account and whether that amount is sufficient to offset the cost of the requested action. If relevant, discussion of budgetary impacts in subsequent years also shall be discussed. Subsequent year fiscal impacts shall be noted for the entire period in which the requested or proposed action would be implemented when it is reasonable to do so (i.e. a five-year lease agreement shall specify the costs/savings for each of the five years in question). Otherwise, impacts associated with the existing and subsequent budget years should be cited.
- D. Describe any assumptions or interpretations that were utilized to provide the information on this form.
- A. The Economic Development Director is requesting authorization to apply for, and if awarded, accept and implement a Community Development Investment Grant from the Wisconsin Economic Development Corporation to be utilized for the redevelopment and expansion of Milwaukee's Asian Market Phongsavan.
- B. No net increase or decrease in the annual budget. Milwaukee County's role in the process will be that of a compliance administrator and conduit for grant funds. Staff time to monitor the project and process the reimbursements will be absorbed in the agency's existing budget.
- C. There will be no budgetary impact as a result of acceptance of the WEDC grant. All matching funds are provided through private investment in the project, as permitted by WEDC.

Funding Agency					TOTAL
Ridgestone Bank SBA guaranteed \$2,509,725	Ridgestone Bank Participation \$418,294	MEDC Participation \$418,281	WEDC Grant \$250,000	*Owner Equity \$487,969	FUNDING \$3,346,300
					<i>75% SBA-backed loan</i>
					<i>\$737,969 Grants and Equity</i>
					<b>\$4,084,269 Total Project Costs</b>

\*Owner equity will be reduced if additional grant funding can be secured, such as a grant from the Havenwoods Economic Development Corporation or a City of Milwaukee façade grant.

D. None.

<sup>1</sup> If it is assumed that there is no fiscal impact associated with the requested action, then an explanatory statement that justifies that conclusion shall be provided. If precise impacts cannot be calculated, then an estimate or range should be provided.

<sup>2</sup> Community Business Development Partners' review is required on all professional service and public work construction contracts.

Department/Prepared By Teig Whaley-Smith, Economic Development Director

Authorized Signature \_\_\_\_\_

Did DAS-Fiscal Staff Review?  Yes  No

Did CBDP Review?<sup>2</sup>  Yes  No  Not Required

**COUNTY OF MILWAUKEE**  
**INTER-OFFICE COMMUNICATION**

**DATE:** March 31, 2014

**TO:** Supervisor Marina Dimitrijevic, Chairwoman, County Board of Supervisors

**FROM:** Teig Whaley-Smith, Economic Development Director, Department of Administrative Services

**SUBJECT: Amendment to County Ground Land Lease**

**POLICY**

The Director of the Economic Development, Department of Administrative Services (DAS) is requesting that the County Board approve an amendment to a Land Lease between the County and Fitness Development Associates, LLC.

**BACKGROUND**

In July of 1998, Milwaukee County entered into a Land Lease agreement for approximately 5 acres of County owned land located at 8700-8714 W Watertown Plank Rd with Fitness Development Associates LLC for use as a Fitness Center (File No.97-840) The recent Wisconsin Department of Transportation (DOT) construction project has reduced frontage along Watertown Plank Rd and thus eliminated the Fitness Centers ability to have signage in front of the building.

This amendment to the lease adds the land that was lost from the DOT's taking to the western edge of the original lease thus allowing space for the Fitness Centers new signage. The land added equals the land lost (6,621 SqFt) and will not change the existing rent schedule.

**RECOMMENDATION**

The Director of the Economic Development, Department of Administrative Services (DAS) recommends approval of this Amendment to the Lease

---

Teig Whaley-Smith  
Economic Development Director

Attachment

cc: Chris Abele, County Executive

Supervisor Patricia Jursik, Chair, Economic & Community Development Committee (ECD)

Supervisor David Bowen, Vice Chair, ECD Committee

Supervisor Willie Johnson, Jr., ECD Committee

Supervisor Michael Mayo, Sr., ECD Committee

Supervisor James (Luigi) Schmitt, ECD Committee

Supervisor Steve F. Taylor, ECD Committee

Supervisor Khalif Rainey ECD Committee

Don Tyler, Director, Department of Administrative Services

John Dargle, Director, Parks Department

Brian Dranzik, Director, Department of Transportation

Scott Manske, Comptroller

Dan Dilibirti, Treasurer

Greg High, Executive Director of Architectural & Engineering, DAS-Facilities Management

Bill Shaw, Geographic Information Systems Supervisor, MCAMLIS

Julie Esch, Director of Operations, Department of Administrative Services

Amber Moreen, Chief of Staff, Office of the County Executive

Kelly Bablitch, Chief of Staff, County Board of Supervisors

Raisa Koltun, Director of Legislative Affairs, Office of the County Executive

Jessica Janz-McKnight, Research Analyst, Comptroller's Office

Jill Suurmeyer, Research Analyst, Comptroller's Office

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(ITEM ) A resolution to amend an existing Land Lease agreement between the County and Fitness Development Associates LLC for the Fitness Center site at 8700-8714 W. Watertown Plank Rd. and authorize Economic Development to sign said amendment on behalf of the County:

**A RESOLUTION**

WHEREAS, in 1998 Milwaukee County entered into a Lease Agreement with Fitness Development Associates, LLC for approximately 5 acres of County owned land at 8700-8714 W Watertown Plank Rd for use as a Fitness Center; and,

WHEREAS, in 2001 the Milwaukee County Board of Supervisors approved the execution of an Amendment with Fitness Development Associates LLC, for additional land to be added to the agreement for use for parking; and,

WHEREAS, A second Amendment was approved and executed for additional parking in 2006; and,

WHEREAS, DOT project (1060-33-23) will expand the Right of Way along West Watertown Plank Rd, and thus eliminate Fitness Development Associates LLC, existing signage in front of their building; and,

WHEREAS, Representatives from the County and Fitness Development Associates LLC wish to have an amendment drafted to properly recognize the DOT's taking and compensate the Lessee with additional land fronting Watertown Plank Road in order to accommodate new signage; now, therefore,

BE IT RESOLVED that the Director, Economic Development Division is hereby authorized to sign the Amendment with Fitness Development Associates LLC, for the Land Lease located at 8700-8714 West Watertown Plank Road

## MILWAUKEE COUNTY FISCAL NOTE FORM

**DATE:** March 31, 2014

Original Fiscal Note                    x

Substitute Fiscal Note

**SUBJECT:** Authorization to amend a land lease with Fitness Development Associates LLC for the site located at 8700-8714 West Watertown Plank Road Wauwatosa, Wisconsin

**FISCAL EFFECT:**

- |  |  |
|--|--|
| <input type="checkbox"/> No Direct County Fiscal Impact<br>x Existing Staff Time Required<br><input type="checkbox"/> Increase Operating Expenditures<br>(If checked, check one of two boxes below)<br><input type="checkbox"/> Absorbed Within Agency's Budget<br><input type="checkbox"/> Not Absorbed Within Agency's Budget<br><input type="checkbox"/> Decrease Operating Expenditures<br><input type="checkbox"/> Increase Operating Revenues<br><input checked="" type="checkbox"/> Decrease Operating Revenues | <input type="checkbox"/> Increase Capital Expenditures<br><input type="checkbox"/> Decrease Capital Expenditures<br><input type="checkbox"/> Increase Capital Revenues<br><input type="checkbox"/> Decrease Capital Revenues<br><input type="checkbox"/> Use of contingent funds |
|--|--|

*Indicate below the dollar change from budget for any submission that is projected to result in increased/decreased expenditures or revenues in the current year.*

	Expenditure or Revenue Category	Current Year	Subsequent Year
<b>Operating Budget</b>	Expenditure	0	
	Revenue	0	
	Net Cost	0	
<b>Capital Improvement Budget</b>	Expenditure		
	Revenue		
	Net Cost		

## DESCRIPTION OF FISCAL EFFECT

In the space below, you must provide the following information. Attach additional pages if necessary.

- A. Briefly describe the nature of the action that is being requested or proposed, and the new or changed conditions that would occur if the request or proposal were adopted.
- B. State the direct costs, savings or anticipated revenues associated with the requested or proposed action in the current budget year and how those were calculated. <sup>1</sup> If annualized or subsequent year fiscal impacts are substantially different from current year impacts, then those shall be stated as well. In addition, cite any one-time costs associated with the action, the source of any new or additional revenues (e.g. State, Federal, user fee or private donation), the use of contingent funds, and/or the use of budgeted appropriations due to surpluses or change in purpose required to fund the requested action.
- C. Discuss the budgetary impacts associated with the proposed action in the current year. A statement that sufficient funds are budgeted should be justified with information regarding the amount of budgeted appropriations in the relevant account and whether that amount is sufficient to offset the cost of the requested action. If relevant, discussion of budgetary impacts in subsequent years also shall be discussed. Subsequent year fiscal impacts shall be noted for the entire period in which the requested or proposed action would be implemented when it is reasonable to do so (i.e. a five-year lease agreement shall specify the costs/savings for each of the five years in question). Otherwise, impacts associated with the existing and subsequent budget years should be cited.
- D. Describe any assumptions or interpretations that were utilized to provide the information on this form.

An existing Land Lease is to be amended due to the DOT's expansion of Right of Way along Watertown Plank Road and thus eliminating the Lessee's existing signage for the building. County will add the space lost to the western end of the existing lease area, which will allow for new signage to be erected. No changes will be made to the existing Rent Schedule.

Department/Prepared By Teig Whaley-Smith, Economic Development Director

Authorized Signature \_\_\_\_\_

Did DAS-Fiscal Staff Review?  Yes  No

Did CDBP Review?<sup>2</sup>  Yes  No  Not Required

<sup>1</sup> If it is assumed that there is no fiscal impact associated with the requested action, then an explanatory statement that justifies that conclusion shall be provided. If precise impacts cannot be calculated, then an estimate or range should be provided.

<sup>2</sup> Community Business Development Partners' review is required on all professional service and public work construction contracts.

AMENDMENT THREE TO  
FITNESS DEVELOPMENT ASSOCIATES, LLC LEASE  
FOR 8700 WATERTOWN PLANK RD.

This **Amendment Three** to the Fitness Development Associates, LLC Lease (Lease), is made this **first day of May, 2014**, by and between **Milwaukee County**, a Wisconsin body corporate (Lessor), and **Fitness Development Associates, LLC**, a limited liability company organized and existing under the laws of the State of Wisconsin (lessee).

**RECITALS**

- A. Lessor and Lessee are parties to a lease agreement dated July 29, 1998, pursuant to which Lessor leased to Lessee certain land on Milwaukee County Grounds, upon which Lessee developed and operates a fitness center.
- B. Lessor and Lessee are parties to an **Amendment One**, of the above-described Lease Agreement, dated December 10, 2001, pursuant to which the Lessor leased to Lessee additional land on Milwaukee County Grounds, upon which Lessee developed and operates an additional parking lot.
- C. Lessor and Lessee are parties to an **Amendment Two**, of the above described Lease Agreement, dated January 1, 2006, pursuant to which the Lessor leased to Lessee additional land on Milwaukee County Grounds, upon which Lessee developed for additional parking.
- D. In order to offset leased land lost and to accommodate building signage lost due to the DOT expansion of Watertown Plank Road, the Lessor and Lessee desire to add a parcel of land consisting of 6,621 square feet to the lease, described in the attached **Appendix A3**.

**NOW THEREFORE**, in consideration of the foregoing and the mutual covenants and agreements set forth herein, and for such other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, Lessor and Lessee agree to amend the above referenced Lease as follows.

1. Section 1. Premises, of the above referenced Lease which reads: "Lessor does hereby lease, let and demise unto Lessee, and Lessee does hereby lease from Lessor, the land located at 8700-8714 Watertown Plank Road, Wauwatosa, WI, (herein after the "Premises"), as described in -Appendix A1, Appendix A2a and Appendix A2b attached hereto and made a part of this Lease," and shall be amended to read:

"Lessor does hereby lease, let and demise unto Lessee, and Lessee does hereby lease from Lessor, the land located at 8700-8714 Watertown Plank Road, Wauwatosa, WI, (herein after the "Premises"), as described in Appendix A1, Appendix A2a, Appendix A2b and Appendix A3 (collectively "Appendix A")

attached hereto and made a part of this Lease.”

Except as otherwise specifically provided herein and in the attachments hereto, the terms and conditions of the above referenced Lease dated July 29, 1998, as amended December 10, 2001 and January 1, 2006 shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have executed this Amendment Three as of the date hereinabove written.

LESSOR: MILWAUKEE COUNTY

By: \_\_\_\_\_  
Chris Abele, County Executive

By: \_\_\_\_\_  
Joseph Czarnecki, County Clerk

LESSEE: FITNESS DEVELOPMENT ASSOCIATES, LLC

By: \_\_\_\_\_  
William A. Heinlein, President

By: \_\_\_\_\_  
Blain J. O’Connell, Secretary

Approved for Execution:

By: \_\_\_\_\_  
Corporation Counsel

Date: \_\_\_\_\_

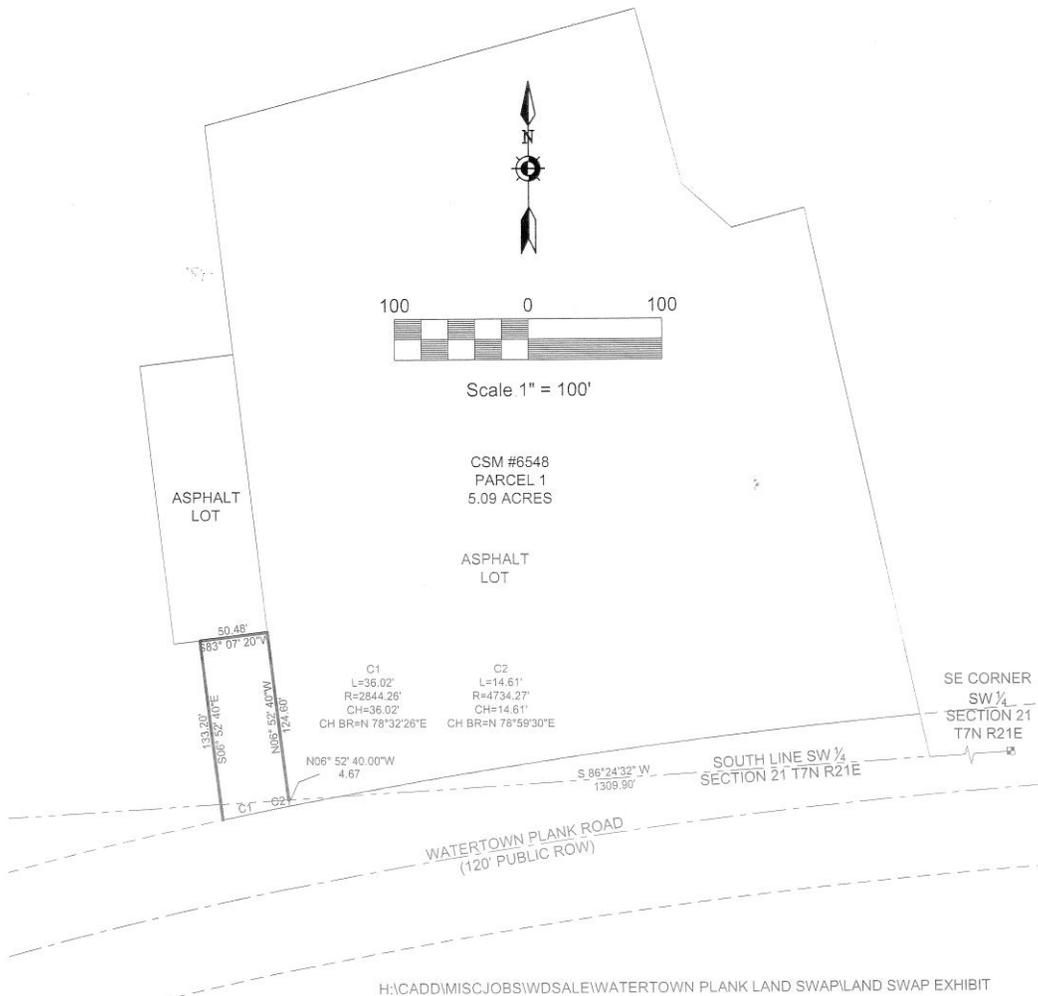
# APPENDIX A PREMISES

## EXHIBIT Appendix A3

THAT PART OF THE SOUTHWEST ¼ OF SECTION 21, TOWNSHIP 7 NORTH, RANGE 21 EAST, IN THE CITY OF WAUWATOSA, MILWAUKEE COUNTY, WISCONSIN, WHICH IS BOUNDED AND DESCRIBED AS FOLLOWS: COMMENCING AT THE SOUTHEAST CORNER OF THE SOUTHWEST ¼ OF SAID SECTION 21; THENCE SOUTH 86°24'32" WEST ALONG THE SOUTH LINE OF SAID ¼ SECTION 1309.90 FEET TO THE POINT OF BEGINNING; THENCE NORTH 06°52'40" WEST 124.60 FEET ALONG THE WEST LINE OF PARCEL #1 OF C.S.M. #6548 TO A POINT; THENCE SOUTH 83°07'20" WEST 50.48 FEET TO A POINT; THENCE SOUTH 06°52'40" EAST 133.20 FEET TO A POINT ON THE NORTH RIGHT OF WAY OF WATERTOWN PLANK ROAD; THENCE ALONG A CURVE TO THE RIGHT ON SAID RIGHT OF WAY 36.02 FEET, HAVING A RADIUS OF 2844.26 FEET AND A CHORD NORTH 78°32'26" EAST 36.02 FEET; THENCE ALONG A CURVE TO THE RIGHT ON SAID RIGHT OF WAY 14.61 FEET, HAVING A RADIUS OF 4734.27 FEET AND A CHORD NORTH 78°59'30" EAST 14.61 FEET; THENCE NORTH 06°52'40" WEST 4.67 FEET TO SAID POINT OF BEGINNING.

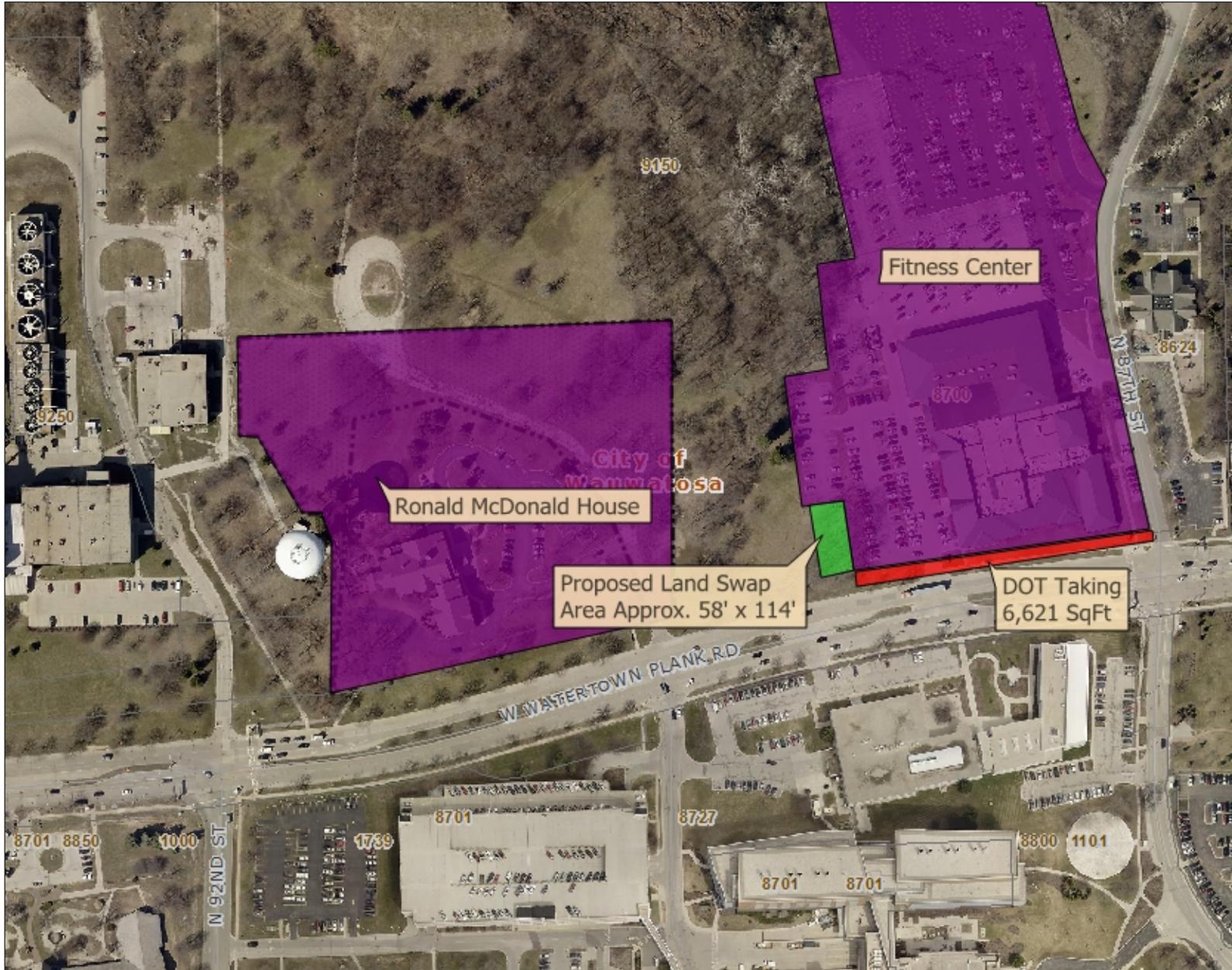
SAID PARCEL CONTAINS 6,621 SQUARE FEET OR 0.15 ACRES OF LAND MORE OR LESS.

MARCH 6, 2014





# MILWAUKEE COUNTY INTERACTIVE MAP SERVICE



## Legend

- County Boundary
- Highways, to 8k
- Street Centerlines, 0k to 8k
- Railroad 8k
- Water 8k
- Rivers 8k
- Airport 8k
- Landmarks 8k
- County Parks 8k
- Municipal Subdivisions 25k
- Tax Parcels

### AERIAL PHOTO 2013 HIGH R

- Red: Band\_1
- Green: Band\_2
- Blue: Band\_3

### AERIAL PHOTO 2010 HIGH R

- Red: Band\_1
- Green: Band\_2
- Blue: Band\_3

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468 0 234 468 Feet

**DISCLAIMER:** This map is a user generated static output from the Milwaukee County Land Information Office Interactive Mapping Service website. The contents herein are for reference purposes only and may or may not be accurate, current or otherwise reliable. No liability is assumed for the data delineated herein either expressed or implied by Milwaukee County or its employees.

## Notes

Enter Map Description

**COUNTY OF MILWAUKEE**  
INTEROFFICE COMMUNICATION

DATE: March 31, 2014

TO: Supervisor Patricia Jursik, Chair, Economic & Community Development Committee

FROM: Teig Whaley-Smith, Economic Development Director, Department of Administrative Services

SUBJECT: Economic Development Division – Quarterly Performance Update

**REQUEST**

There is no request at this time; this report is for informational purposes only.

**BACKGROUND**

Attached is the 2014 – 1<sup>st</sup> Quarter Performance Dashboard.

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Teig Whaley-Smith  
Economic Development Director, Department of Administrative Services

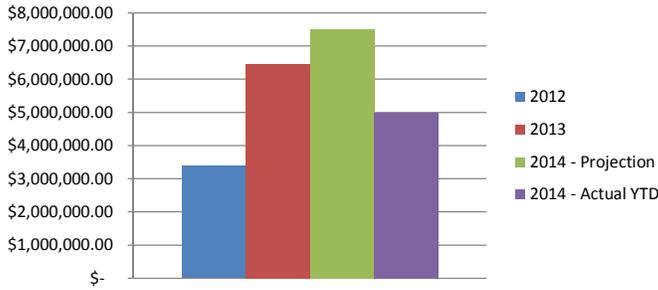
cc: Chris Abele, County Executive  
Marina Dimitrijevic, County Board Chairwoman  
Economic and Community Development Committee Members  
Don Tyler, Director, Department of Administrative Services  
Amber Moreen, Chief of Staff, Office of the County Executive  
Kelly Bablitch, Chief of Staff, County Board of Supervisors  
Raisa Koltun, Director of Legislative Affairs, County Executive's Office  
Julie Esch, Director of Operations, DAS  
Jessica Janz-McKnight, Research Analyst, Comptroller's Office  
Jill Suurmeyer, Research Analyst, Comptroller's Office



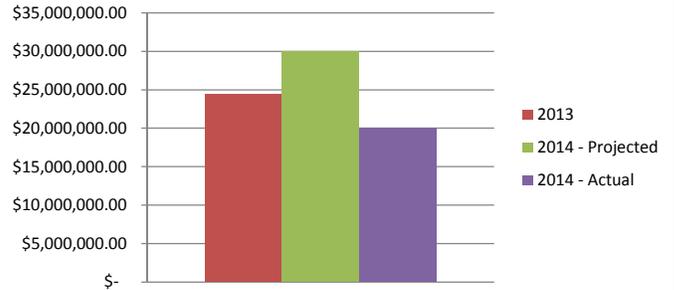
# Economic Development Division

Performance Dashboard: 1st Quarter 2014

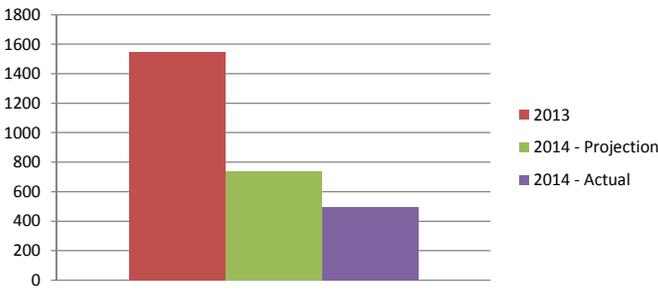
## Land Sales



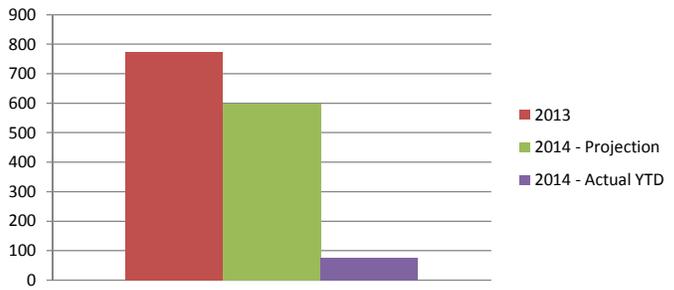
## Tax Base Generated



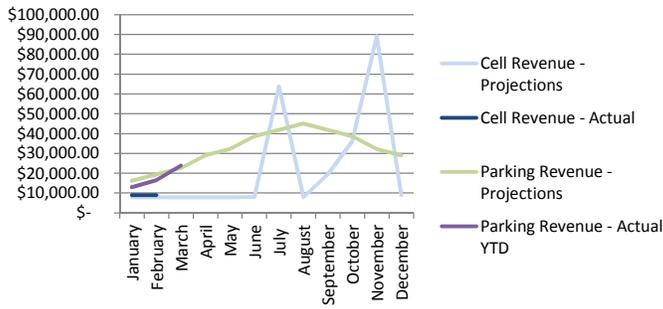
## Construction Jobs Created



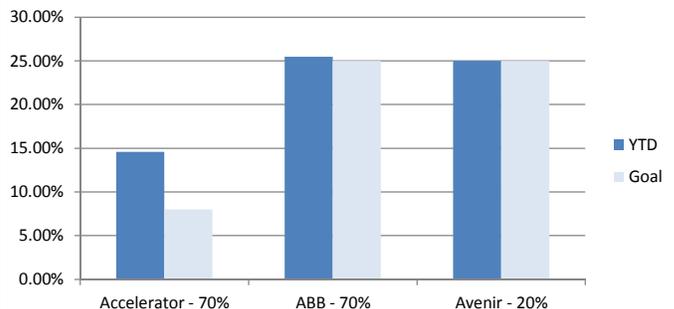
## Other Jobs Created/Placed/Recruited



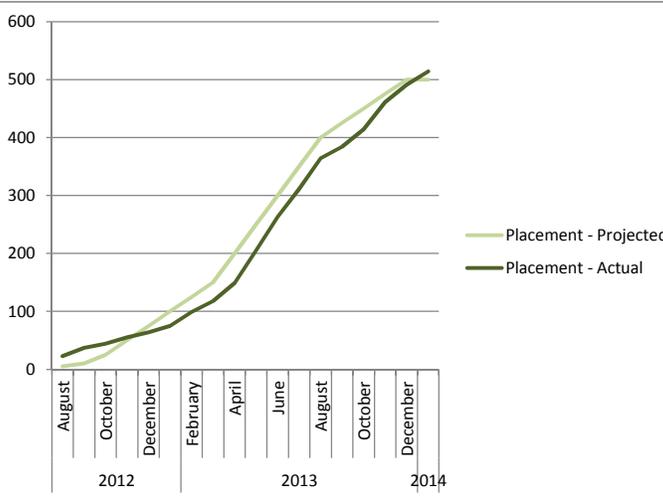
## Cell & Parking Revenue



## DBE Participation (Development - % Complete)

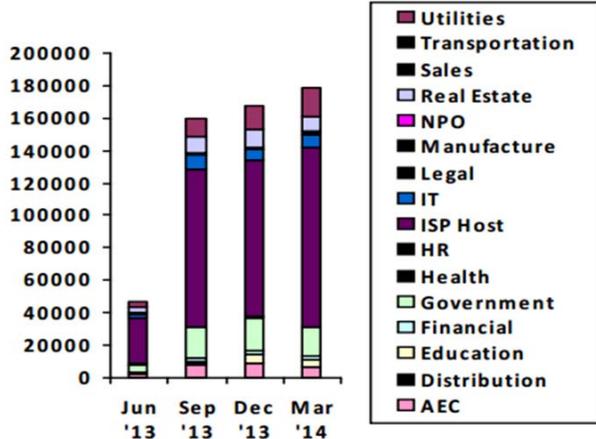


## Workforce Training



## MCAMLIS

### MCLIO Website Page Views



**COUNTY OF MILWAUKEE**  
INTEROFFICE COMMUNICATION

DATE: March 31, 2014

TO: Supervisor Patricia Jursik, Chair, Economic & Community Development Committee

FROM: Teig Whaley-Smith, Economic Development Director, Department of Administrative Services

SUBJECT: TIF Joint Review Board Update – 2013 Meetings

**REQUEST**

There is no request at this time, this report is for informational purposes only.

**BACKGROUND**

County Board Resolution 14-94 requires Milwaukee County's appointed representative to municipal Joint Review Boards to provide the Committee on Community and Economic Development an informational update related to the actions taken by any municipal Joint Review Boards, including any votes cast by the County representative. The following report relates to all JRB meetings that occurred in 2013. Going forward, the Committee shall receive semi-annual updates unless they request otherwise.

Three municipalities held JRB meetings in 2013: City of Milwaukee, City of Oak Creek and City of Franklin.

City of Milwaukee

*Minutes of JRB meetings are not kept by the City of Milwaukee: they publish the notice and agenda for each meeting and members personally sign the JRB resolution if they approve the TID plan. What follows are the dates of the JRB meeting for each project plan/amendment, a brief explanation of the project plan/amendment and the resulting vote.*

- Amendment No. 3 to Project Plan – TID 22 – Beerline B: March 20, 2013

The purpose of the amendment is to donate funds from TID 22 to underperforming TIDs; specifically TID 60 – Amtrak/Intermodal Station and TID 62 – DRS Power & Control Technologies, Inc. Amendment was approved by a vote of 4-0, as the citizen member was absent.

- Amendment No. 2 to Project Plan – TID 41 – Time Warner Riverwalk Project: July 23, 2013

The purpose of this amendment is to provide \$1.7 million for the purpose of facilitating improvements to North 2<sup>nd</sup> Street and reconstructing West Galena Street to allow for vehicular traffic. Amendment was approved by a unanimous 5-0 vote.

- Amendment No. 2 to Project Plan – TID 42 – Capitol Court/Midtown Center: October 23, 2013

The purpose of this amendment is to provide \$3.5 million for the purposes of creating an economic development fund to assist with continued redevelopment efforts and new development projects within the TID project area. In addition, provide up to \$1.5 million for the purposes of paving six street segments located within one-half mile of the current TID boundary to upgrade and improve access in and around the District. The TID has a surplus of \$2,332,829 and is (with the amendment) be estimated for retirement in 2015. Amendment was approved by a vote of 4-0, as the citizen member was absent.

- Amendment No. 2 to Project Plan – TID 53 – Menomonee Valley Business Park: June 11, 2013

The purpose of the amendment is to allow RACM to use \$1.3 million of increment to fund the costs of final preparation of the remaining three sites for redevelopment and to assist in the final environmental capping of the project area. Amendment was approved by a unanimous 5-0 vote.

- Amendment No. 2 to Project Plan – TID 56 – Erie Jefferson Riverwalk: July 23, 2013

The purpose of the amendment is to provide \$128,000 for the purposes of acquiring riverfront property and performing necessary engineering studies on existing railroad structure, with the intent of extending the City's Riverwalk and increasing public access to the Milwaukee River. Additionally, the amendment will permit the donation of funds to three districts which have incurred substantial costs for low and moderate income housing developments, but have generated little or no incremental revenue; specifically TID 58 (20<sup>th</sup> and Walnut); TID 65 (N. 20<sup>th</sup> and W. Brown Streets); and TID 66 (Metcalfe Park Homes). Amendment was approved by a unanimous 5-0 vote.

- Amendment No. 1 to Project Plan – TID 71 – Mitchell Street: June 11, 2013

The purpose of the amendment is to deal with the insolvency issues experienced by the TID due to the deteriorated economic and falling property values. It is proposed that the original Base Value of \$75.25 million be reset by deducting all the parcels from the territory of the TID at the 2008 level and then adding back into the territory all parcels at the current 2013 value, resetting the Base Value at approximately \$65 million such that future redevelopment will have a greater opportunity to achieve a positive increment and amortize current project costs in the future. Amendment was approved by a unanimous 5-0 vote.

- Project Plan for TID 78 – Northwestern Mutual: June 11, 2013

The newly proposed TID has the following goals and objectives: (1) create and retain jobs at NM in downtown Milwaukee; (2) increase the tax base of the City by developing a property in need of rehabilitation or conservation in downtown Milwaukee; (3) provide funding for public infrastructure that is not feasible without public/private cooperation, including street reconstruction, upgraded utilities, streetscaping and pedestrian enhancements; (4) implement a catalytic project, as set forth in the Downtown Area Plan 2010 Update, which called for a new gateway to Downtown Milwaukee near East

Michigan Street and North Lincoln Memorial Drive, as well as increased private investment in the area. Project Plan was approved by a unanimous 5-0 vote.

- Project Plan for TID 79 – North Water Street Riverwalk: June 11, 2013

The newly proposed TID has the following goals and objectives: (1) Provide a \$1.6 million grant to assist in the construction of 315 linear feet of new Riverwalk and Dockwall along the Milwaukee River, in conjunction with the development of an 87 unit, 4-story apartment complex; (2) Ensure public access to the Milwaukee River with the construction of public access routes, a Riverwalk and improvements to the existing dockwall; and (3) eliminate obsolete conditions and blighting influences that impede development and detract from the functionality, aesthetic appearance and economic welfare of this section of the City. Project Plan was approved by a unanimous 5-0 vote.

#### City of Oak Creek

- Amendment to TID 11 – Drexel Town Square: December 3, 2013

The purpose of the amendment is to (1) update the cost of infrastructure and developer incentives for Drexel Town Square; and (2) add another property to the TID, allowing the City to extend South 6<sup>th</sup> Street.

After a brief discussion regarding the overall development, County representative requested information on what the Council reviewed regarding incentives and requested that within the development agreement boilerplate language be included to ensure access for public transportation to the Drexel Town Square. No votes were taken, as this was the organizational meeting.

#### City of Franklin

- Amendment to TID 3 – 27<sup>th</sup> Street Corridor: August 19, 2013 and September 18, 2013

*August 19, 2013 Meeting:* The JRB was given a presentation on the project plan amendment, the purpose of which is to (1) facilitate further private development and redevelopment by adding territory to the District, thereby amending its boundaries; (2) modify the categories, locations and costs of the Projects to be undertaken; and (3) allow costs to be incurred outside of, but within ½ mile of the District boundaries.

Mayor Taylor briefly addressed the relationship between the City of Franklin and the City of Oak Creek on the development of the 27<sup>th</sup> Street Corridor and a discussion of the project plan was held. No votes were taken, as this was the organizational meeting.

*September 18, 2013 Meeting:* It was determined no changes to the plan amendment had been made since the organizational meeting, with the exception of updating a map to more clearly identify intended boundaries. It was noted there was no public participation at the public hearing on this amendment, the amendment was adopted by the Franklin Community Development Authority on August 22, 2013 and further adopted by the Franklin Common Council on September 3, 2013.

A discussion was held and the JRB voted unanimously (5-0) to approve the amendment.

**RECOMMENDATION**

There is no recommendation at this time, this report is for informational purposes only.

---

Teig Whaley-Smith  
Economic Development Director, Department of Administrative Services

cc: Chris Abele, County Executive  
Marina Dimitrijevic, County Board Chairwoman  
Economic and Community Development Committee Members  
Don Tyler, Director, Department of Administrative Services  
Amber Moreen, Chief of Staff, Office of the County Executive  
Kelly Bablitch, Chief of Staff, County Board of Supervisors  
Raisa Koltun, Director of Legislative Affairs, County Executive's Office  
Julie Esch, Director of Operations, DAS  
Jessica Janz-McKnight, Research Analyst, Comptroller's Office  
Jill Suurmeyer, Research Analyst, Comptroller's Office

COUNTY OF MILWAUKEE  
INTEROFFICE COMMUNICATION

10

DATE: March 31, 2014

TO: Supervisor Patricia Jursik, Chair, Economic & Community Development Committee

FROM: Teig Whaley-Smith, Economic Development Director, Department of Administrative Services

SUBJECT: Status of Excess Property Sales (File 14-8) (Informational Only)

The Real Estate Services Section of the Economic Development Division reports on a monthly basis, the status of excess property sales. Attached is the report for period beginning February 18, 2014 and ending March 21, 2014.



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Teig Whaley-Smith  
Economic Development Director, Department of Administrative Services

Attachment

cc: Chris Abele, County Executive  
Marina Dimitrijevic, County Board Chairwoman  
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Kelly Bablitch, Chief of Staff, County Board of Supervisors  
Raisa Koltun, Director of Legislative Affairs, County Executive's Office  
Julie Esch, Director of Operations, DAS  
David Cialdini, Economic Development Real Estate Agent  
Jessica Janz-McKnight, Research Analyst, Comptroller's Office  
Jill Suurmeyer, Research Analyst, Comptroller's Office

## REAL ESTATE SERVICES SECTION

REVENUE STATUS REPORT  
Period ending March 21, 2014

### CLOSED PROPERTIES

Property	Committee Date	Closed	Gross Sale Proceeds
3802 E Cudahy Ave, Cudahy		January 16, 2014	\$ 9,000.00
		TOTAL	\$ 9,000.00
		<b>2014 Budget</b>	<b>\$ 400,000.00</b>

### PENDING PROPERTY CLOSINGS

Property	Committee Date	Pending Closing	Gross Sale Proceeds
6215 W National Ave, West Allis	October 26, 2013	2014	\$ 31,800.00
Block 6E, Park East Development	April 3, 2006	2014	\$ 406,000.00 <sup>1</sup>
		TOTAL	<b>\$ 437,800.00</b>

### GENERAL PROPERTY STATUS

Property	Date Made Available	Status	Asking Price
5414-22 S Packard Avenue, Cudahy	June 12, 2006	Available for sale	\$ 35,000.00
3618 E Grange, Cudahy	August 11, 2009	Available for sale	\$ 4,900.00
3749 E Squire, Cudahy	June 21, 2001	Available for sale	\$ 16,900.00
8450 West Beatrice Ct., Milwaukee	August 8, 2008	Available for sale	\$ 375,000.00 <sup>2</sup>
9074 S 5 <sup>th</sup> Ave, Oak Creek	February 12, 2010	Available for sale	\$ 28,900.00
9262 N 60 <sup>th</sup> Street, Brown Deer	March 11, 2014	Available for sale	Appraisal in Progress
801 E. Ravine Lane, Bayside	March 11, 2014	Available for sale	Appraisal in Progress
7815 N River Road, River Hills	March 11, 2014	Available for sale	Appraisal in Progress
7634 N Senica Road, Fox Point	March 11, 2014	Available for sale	Appraisal in Progress
2525 W Mill Road, Glendale	March 11, 2014	Available for sale	Appraisal in Progress
6034 N Park Road, Glendale	March 11, 2014	Available for sale	Appraisal in Progress
1811 W Silver Spring Drive, Glendale	March 11, 2014	Available for sale	Appraisal in Progress
4430 N 108 <sup>th</sup> Street, Wauwatosa	March 11, 2014	Available for sale	Appraisal in Progress
801 W Glendale Avenue, Glendale	March 11, 2014	Available for sale	Appraisal in Progress
4104 N Morris Boulevard, Shorewood	March 11, 2014	Available for sale	Appraisal in Progress
10424 W Woodward Avenue, Wauwatosa	March 11, 2014	Available for sale	Appraisal in Progress
2578 Wauwatosa Avenue, Wauwatosa	March 11, 2014	Available for sale	Appraisal in Progress
527 N 98 <sup>th</sup> Street, Wauwatosa	March 11, 2014	Available for sale	Appraisal in Progress

<b>Property</b>	<b>Date Made Available</b>	<b>Status</b>	<b>Asking Price</b>
5617 W. National Avenue, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
1229 S 76 <sup>th</sup> Street, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
8614 W Mitchell Street, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
2104 S 70 <sup>th</sup> Street, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
7133 W Becher Street, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
1566 S 64 <sup>th</sup> Street, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
1607 S 54 <sup>th</sup> Street, West Milwaukee	March 11, 2014	Available for sale	Appraisal in Progress
2065 S 57 <sup>th</sup> Street, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
2151 S 63 <sup>rd</sup> Street, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
2105 S 79 <sup>th</sup> Street, West Allis	March 11, 2014	Available for sale	Appraisal in Progress
3410 S Schauer Avenue, Greenfield	March 11, 2014	Available for sale	Appraisal in Progress
3509-11 E Plankinton Avenue, Cudahy	March 11, 2014	Available for sale	Appraisal in Progress
3711E Barnard Avenue, Cudahy	March 11, 2014	Available for sale	Appraisal in Progress
3677 E Carpenter Avenue, Cudahy	March 11, 2014	Available for sale	Appraisal in Progress
3834 E Edgerton Avenue, Cudahy	March 11, 2014	Available for sale	Appraisal in Progress
3901 E Martin Avenue, Cudahy	March 11, 2014	Available for sale	Appraisal in Progress
3127 E Luzerne Avenue, Cudahy	March 11, 2014	Available for sale	Appraisal in Progress
6465 S Whitnall Edge Road, Franklin	March 11, 2014	Available for sale	Appraisal in Progress
2427 W Carrington Avenue, Oak Creek	March 11, 2014	Available for sale	Appraisal in Progress
1628 Carroll Avenue, South Milwaukee	March 11, 2014	Available for sale	Appraisal in Progress
1315 Nicholson Avenue Rear, South Milwaukee	March 11, 2014	Available for sale	Appraisal in Progress
S 35 <sup>th</sup> Street, Franklin	March 11, 2014	Available for sale	Appraisal in Progress
1606 18 <sup>th</sup> Avenue, South Milwaukee	March 11, 2014	Available for sale	Appraisal in Progress
2001 7 <sup>th</sup> Avenue, South Milwaukee	March 11, 2014	Available for sale	Appraisal in Progress
8124 S Lakeview Drive, Franklin	March 11, 2014	Available for sale	Appraisal in Progress
8143 S 34 <sup>th</sup> Street, Franklin	March 11, 2014	Available for sale	Appraisal in Progress
8474 S Burrell Street, Oak Creek	March 11, 2014	Available for sale	Appraisal in Progress
9139 S 5 <sup>th</sup> Avenue, Oak Creek	March 11, 2014	Available for sale	Appraisal in Progress
165 E Golden Lane, Oak Creek	March 11, 2014	Available for sale	Appraisal in Progress
10568 S Alton Road, Oak Creek	March 11, 2014	Available for sale	Appraisal in Progress

1. County's share of \$700,000 sales price
2. Net proceeds to Federal Transit Administration or Future Transit Capital Project

**SUMMARY DETAIL OF PENDING PROPERTY CLOSINGS**

<b>PROPERTY</b>	<b>BUYER</b>	<b>CLOSING</b>	<b>COMMENTS</b>
6215 W National Ave	City of West Allis	2014	Sale is contingent upon a successful MOU eliminating Storm Water Management Fees against Milwaukee County owned properties.

**SUMMARY DETAIL OF UWM, INNOVATION PARK, LLC SALE**

<b>PROPERTY</b>	<b>BUYER</b>	<b>CLOSING</b>	<b>COMMENTS</b>
NE Quadrant County Grounds	UWM, Innovation Park, LLC	February 15, 2011	<p>Initial \$5 million paid February 15, 2011.</p> <p>Second \$5 million payment was received on February 5, 2014</p> <p>County Board extended each of the purchase price installment payment dates after closing by twenty-four (24) months as follows:</p> <ul style="list-style-type: none"><li>• \$887,500 payable on February 15, 2015</li><li>• \$887,500 payable on February 15, 2016</li><li>• \$887,500 payable on February 15, 2017</li><li>• \$887,500 payable on February 15, 2018</li></ul>

DATE: March 31, 2014

TO: Supervisor Patricia Jursik, Chair, Economic & Community Development Committee

FROM: Teig Whaley-Smith, Economic Development Director, Department of Administrative Services

SUBJECT: Downtown Transit Center Update (File 14-9)

**REQUEST**

There is no request at this time; this report is for informational purposes only.

**BACKGROUND**

At the April 15, 2013 ECD Committee meeting a request was made that Economic Development staff ("ED Staff") prepare a monthly written report on the Status of Negotiations with Barrett Visionary Development ("BVD"), using resolution 12-633 as a guidepost ("Resolution"). The text of the resolution is repeated below in italics, with the respective update below.

- 1. Develop a plan to incorporate the components of the Park East Redevelopment Compact (PERC) into the development agreement in order to provide additional sustainable community benefits that includes disadvantaged business opportunities and verified best faith efforts to employ Milwaukee County racial minorities and women in the project.*

In the last month, ED Staff has met frequently with BVD to move negotiations forward. BVD was successful in meeting similar workforce goals in its previous projects and intends to do the same on this project.

- 2. Identify or develop an element of public attraction within the proposed development and ensure the project does not compete with public use facilities near the site.*

Current plans include public access across Lincoln Memorial Drive, public access throughout the elevated first floor, public parking and other public attractions that do not compete with public use facilities near the site.

- 3. Advise the Committee on Economic and Community Development on the appraised value of the site with the understanding that the County Board expects to receive fair market value for the property.*

ED staff has received an appraisal. The appraisal, together with demolition, environmental remediation, other cost estimates, and public benefits negotiated will be used to establish a purchase price.

4. *Work with the Parks Director and the Wisconsin Department of Natural Resources to determine if any portion of the development site is in conflict with the lakebed public trust doctrine.*

The State of Wisconsin has specified that the development site and other applicable sites west of the 1913 line are "not part of the lake bed of Lake Michigan" (Wis. Stats. Sec. 30.2038).

5. *Prepare written reports for each monthly meeting of the Committee on Economic and Community Development on the status of the negotiations with Barrett Visionary Development with the understanding that the committee may, at its discretion, direct that a Request for Proposal (RFP) process be initiated if negotiations do not progress.*

This report is designed to meet this requirement.

#### **RECOMMENDATION**

There is no recommendation at this time; this report is for informational purposes only.



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Teig Whaley-Smith  
Economic Development Director, Department of Administrative Services

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