

MEMORANDUM



Date: February 15, 2022

From: Art Carter, Chief Local Elected Official

To: **Local Elected Officials**

Mr. Marty Brewer

Mr. Robert Keeney

Mr. John Meyers

Mr. Russ Podzilni

Mr. Jack Sauer

RE: **Southwest Wisconsin Counties Consortium (SWCC) Meeting Notice**

Tuesday, February 22, 2022, 11:30 a.m. to 1:00 p.m.

This meeting will be held in via conference call.

Call-in Number: **1-888-273-3658**

Access Code: **3107524**

The next meeting of the Local Elected Officials, Southwest Wisconsin Counties Consortium is scheduled for Tuesday, February 22, 2022, at the time and location listed above. This meeting will follow SWWRPC's meeting. The agenda for the meeting is included for your review.

All county board chairs are urged to attend the meeting. If you cannot attend, please arrange for an alternate to represent your county.

If you are unable to attend the meeting, please contact Katie Gerhards at k.gerhards@swwdb.org or (608) 314-3300 two days prior to the meeting date.

SWWDB is an equal opportunity employer and service provider. Upon advance request, reasonable accommodations will be made for persons with disabilities. If special accommodations are needed, please contact Katie Gerhards (k.gerhards@swwdb.org) or (608) 314-3300 at least two days prior to the meeting.

A proud partner of the  American Job Center network

Southwest Wisconsin Counties Consortium

Tuesday, February 22, 2022

11:30 a.m. to 1:00 p.m.

Conference Call:

Call-in Number: **1-888-273-3658**

Access Code: **3107524**

Agenda

1. Approval of Agenda – (Action)

Approval of the February 22, 2022, meeting agenda is requested.

2. Approval of Minutes – (Action)

Minutes of the Southwest Wisconsin Counties Consortium (SWCC) meeting held on November 23, 2021, are contained in [Enclosure 1](#). Approval of the meeting minutes is requested.

3. Program Year 2021-22 Financial Reports, Quarter 2 – (Action)

Danielle Thousand will share the SWWDB financial statements representing a draft of the financial condition of the organization through December 31, 2021. The following reports are submitted for review and consideration:

- Balance Sheet – [Enclosure 2](#)
- Statement of Operations – [Enclosure 3](#)

Additionally, SWWDB receives grants and contracts throughout the year that either increase or reduce the originally approved fiscal year budget. Budget modifications for the current program year are listed in [Enclosure 4](#).

Approval of the Program Year (PY) 2021-22 Quarter 2 financial statements and budget modifications is requested.

4. Appointment of Board Members – (Action)

Board Member Gina Erickson from Tricor Insurance retired on December 31, 2021. The Greater Beloit Chamber of Commerce has nominated Keith Kruse, Partner/Vice President at Tricor Insurance to assume Ms. Erickson's seat on the Board. Nomination materials are included in [Enclosure 5](#).

SWWDB administration considers Mr. Kruse a qualified applicant to the open Board seat and is seeking formal appointment action from the SWCC.

5. Southwest Wisconsin Counties Consortium Agreement

Rhonda Suda provided members with an updated Southwest Wisconsin Counties Consortium Agreement that reflects updated language related to the obligation and management of Workforce Innovation and Opportunity Act (WIOA)-related disallowed costs. Section 8 has been updated to reflect the new language discussed at the November 23, 2021, meeting. This document was emailed to SWCC members on December 3, 2021, to give members an opportunity to review the proposed changes with County council.

As described in Section 10, the Agreement “may only be revised, modified or amended in writing and upon a majority vote of the Consortium with the governing By-Laws.”

SWWDB administration is looking forward to additional discussion to determine the most appropriate method of addressing WIOA-related disallowed costs.

6. SWWDB Recertification

The Department of Workforce Development (DWD) has recertified the Southwest Wisconsin Workforce Development Board for calendar years 2022 and 2023. The recertification approval letter is provided in [Enclosure 6](#).

7. Leased Employee Program – (Information)

SWWDB has maintained a leased employee program for several years. The program has been primarily serving local county governmental entities and non-profits who are in need of limited-term employees. All employees placed through this program have access to all SWWDB benefits, which are determined by their full- or part-time status.

Danielle Thousand will provide an update on SWWDB’s leased employee program ([Handout 1](#)).

8. Adjournment

The next meeting of the Southwest Wisconsin Counties Consortium is tentatively scheduled for May 24, 2022.

Southwest Wisconsin Counties Consortium Meeting

November 23, 2021

Meeting Minutes

The Southwest Wisconsin Counties Consortium meeting was held on Tuesday, November 23, 2021, via conference call and at the SWWDB Administrative Office, 1370 North Water Street, Platteville, WI 53818. Attendance was as follows:

| | | |
|-------------------------|---------------------------------------|--|
| Members Present: | Mr. Art Carter Mr. Robert Keeney | Mr. John Meyers Mr. Russ Podzilni * |
| Members Absent: | Mr. Marty Brewer | Mr. Jack Sauer |
| Staff Present: | Ms. Katie Gerhards Ms. Rhonda Suda | Ms. Danielle Thousand |

*Joined via conference call.

The meeting of the Southwest Wisconsin Counties Consortium (SWCC) was called to order by Mr. Carter at 11:36 a.m.

1. Approval of Agenda

The meeting agenda of the November 23, 2021, SWCC meeting was reviewed by SWCC members. No corrections or changes were made.

Motion made by Mr. Podzilni, seconded by Mr. Meyers, to approve the November 23, 2021, SWCC meeting agenda. **Motion carried unanimously.**

2. Approval of Minutes

The meeting minutes of the August 24, 2021, SWCC meeting were distributed and reviewed by SWCC members.

Motion made by Mr. Keeney, seconded by Mr. Podzilni, to approve the minutes of the Southwest Wisconsin Counties Consortium (SWCC) meeting held on August 24, 2021. **Motion carried unanimously.**

3. Program Year 2021-22 Financial Reports, Quarter 1

Ms. Thousand presented the financial statements to SWCC members. The draft financial statements include the Balance Sheet and Statement of Operations as of September 30, 2021.

The Balance Sheet is current through Quarter 1 (July 1 – September 30). It shows that revenues are exceeding expenses by \$45,856.70. SWWDB is still in the process of closing the Foodshare Employment and Training (FSET) grant from last year that ended September 30, 2021, which would impact/increase

both Accounts Receivable and Accounts Payable. The last check run to process FSET invoices from last year is today. Ms. Thousand noted that FSET is SWWDB's largest funding source.

There are some negative asset amounts on the Balance Sheet. Ms. Thousand explained that SWWDB had an employee who was going out on extended leave. The SWWDB Finance Dept. had the employee prepay their share of benefits because the employee was unsure how long they would be out and SWWDB owes that employee coverage. SWCC members were also informed of the new lease for the new Rock County Job Center site. It is slightly less than that of the old site.

Account 1540-PAS Rewrite Project is a new account. PAS (Payment Authorization System) is SWWDB's software used for obligating, vouchering, and tracking funds. Case Managers use it every day to reserve funds for program participants. In August, SWWDB made a down payment for the project. When the project is complete, SWWDB will amortize it over a 10-year period.

Account 3003-Accrued Vacation includes only vacation for the new/current program year that is earned but not yet used. Any carried over vacation from the prior year ending June 30, 2021 (as it cannot pay out upon termination) is not a liability to SWWDB, so this account will only be on the statements in quarters one through three. By Quarter 4, carried over vacation must be used or it will be lost. Any unused vacation from the current program year can be carried over with prior approval from Ms. Suda.

Mr. Meyers asked about SWWDB's company car and if it gets depreciated. Ms. Thousand said yes and it is fully depreciated already.

Since SWWDB is through Quarter 1, the goal on the Statement of Operations is to be around 25% spent. The column labeled "Pct" is showing revenues at 24.07%, and expenditures at 24.86%. SWWDB's budget is running in line.

Ms. Thousand stated that conference season will kick off in Quarter 2. However, account 6170-Staff Train/Development is showing around 382% spent. When the budget was prepared, SWWDB administration was not aware of the Pathways Home 2 funding. This grant came with training staff needed to complete.

Account 6343-Board is starting to have activity again. SWCC members were told to expect this account to increase.

Account 6709-Incentives is showing 32% spent due to the Foster Care/Independent Living grant. Eligible youth participants can receive direct stimulus payments of \$1,000 per month for six (6) months.

The Budget Modifications show changes to the budget since the last meeting. The biggest change is the addition of the Pathway Home 2 funding. It is a \$3 million grant and is connected with the Department of Corrections (DOC) and county jails.

The Rapid Response Annual Allotment was adjusted to the actual amount received which was less. However, the Rapid Response Dislocation Grants received additional funding via a modification. The Employee Recovery and Dislocated Worker Grant (ERDWG) increased as SWWDB received the second year of funding in the amount of \$250,000.

Ms. Thousand indicated that with the Department of Workforce Development's (DWD) approval, SWWDB transferred formula funds from the Workforce Innovation and Opportunity Act (WIOA) Dislocated Worker program to the WIOA Adult program because that is where the need is. It was noted that the ERDWG helps serve participants in the Dislocated Worker program.

Another big change is being awarded the Worker Advancement Initiative (WAI) grant. It is a \$1.6 million grant that can be used through September 30, 2023. SWWDB's budget has nearly doubled with these new grants.

The Independent Living/Foster Care grant increased as SWWDB is able to help purchase a vehicle for participants. This grant assists foster care youth aging out of the system and is a great opportunity.

Ms. Suda added that these new grants provide SWWDB with many opportunities to partner with WIOA partners and make new partnerships. When SWWDB administration applied for the Pathway Home 2 grant, the application was written aggressively with three (3) other boards-Fox Valley, Northwest, and Western. The goal is to serve 800 individuals that are lower risk in 3.5 years. The grant does not eliminate serving high risk individuals. The grant will serve those incarcerated 280 days before their release. Participants will maintain the same Case Manager throughout their time receiving assistance and receive services such as counseling and assessment behavioral intervention.

The total grant is worth around \$3.8 million. Ms. Suda added that there will be carryover every year. Each local board will receive between \$150,000 and \$170,000 in subcontracts. Supportive and training funds are available. Examples of supportive assistance includes, but are not limited to, transportation, auto repairs, rent, security deposit, assessments such as AODA and mental health (if not covered by BadgerCare), and stipends. SWWDB's practice is to pay landlords directly rather than offer stipends. Examples of training assistance includes tuition, books, and fees.

The programming will be wrapped up by December 2023 with one-year of follow-up. There will be no more enrollments after December. SWWDB will be working with the county jails and the Prairie du Chien Correctional Institution and may work with the facility in Oregon. Again, the grant is intended to help individuals that are low to medium risk. DOC only helps those that are high risk. SWWDB's Special Projects Supervisor, Marcia Galvan, is the lead on this grant. Ms. Galvan is also working on the Opioid/Support to Communities grant.

Ms. Suda continued by explaining the Worker Advancement Initiative (WAI) grant. It is funded by the State of Wisconsin through DWD. The funds come from the U.S. Department of Treasury. The grant is geared towards where the need is. SWWDB administration determined that the grant should concentrate on childcare/early childhood education, truck driving, manufacturing, and trades. The funds will help participants in childcare provider/early childhood education training offset the cost of tuition, books, and fees and also offer a stipend. The goal is for individuals to remain in their training program and complete it. The grant was written to assist up to 25 individuals in this area, but these numbers are flexible.

Maintenance Technician is a driver industry in all counties in Southwest Wisconsin. The Techs currently working are older and retiring. Employers have indicated a need. This grant will offer entry-level individuals with training and to receive a stipend of \$13 per hour.

Construction UP is for new and existing apprentices. Up to \$5,000 in classroom training is available for day school expenses. Once participants complete training, they can get a \$1,000 stipend.

SWWDB will be working with Blackhawk Technical College (BTC) and Southwest Wisconsin Technical College (SWTC) on the Power Skills portion of the grant. The technical colleges will provide 40 hours of training that includes teamwork, leadership, critical thinking, and more. A \$200 incentive for completing the training is available to participants. SWWDB staff will continue to help with employment and job searching.

SWWDB administration reached out to the Community Action Program (CAP) agencies in Southwest Wisconsin regarding this grant. After their participants get employed and earn a wage of \$15.00 per hour or more, the agency is no longer able to assist. The individuals lose benefits depending on their wage. Ms. Suda went on to say that SWWDB has signed a small contract with the CAP agencies to provide support to individuals who have left the CAP programs and found employment at \$15.00 per hour or more, but are still experiencing needs that cannot be addressed. This could lead to the individuals leaving their job. Enrollments are expected to begin in January.

Mr. Meyers asked if SWWDB had any plans to provide assistance in the medical field. Ms. Suda responded no, but DWD will consider grant modifications six (6) months after the grant start date. At that time, Ms. Suda stated that she will entertain ideas for planning in the medical field. When SWWDB administration was writing the grant application, there was no medical presence at the planning sessions. Mr. Meyers stated there is a need at the county nursing home level as they are in crisis-mode. Mr. Keeney agreed. The rural healthcare field is an issue.

Motion made by Mr. Meyers, seconded by Mr. Keeney, to approve the Program Year (PY) 2021-2022 financial statements, including the Budget Modifications, for the period ending September 30, 2021.

Motion carried unanimously.

4. Fiscal Year 2020-21 Audit

The draft audit report was presented to SWCC members. The audit was conducted by Wegner CPAs of Madison. Wegner staff conducted the audit virtually October 4 – October 7, 2021.

Ms. Thousand indicated that the audit went very well. Wegner is not recommending any adjusting journal entries or proposing any changes to internal controls. During the pandemic, the Finance Dept. has continued to keep multiple staff involved in every process. It was a clean audit with an unmodified opinion.

SWWDB's reserves have been critical lately. Ms. Thousand has been unable to request reimbursement for activities in the Pathway Home 2 (PH2) grant due to an issue at the Department of Labor (DOL) and with the potential for a government shutdown, a healthy reserve has been reassuring.

The draft of the Form 990 was received this morning and was presented for review. The Form 990 is a non-profit income tax document. It matches the financial statements.

On the program side, the Foodshare Employment and Training (FSET) program saw a decrease in enrollments. During the pandemic, the Department of Health Services (DHS) waived the work requirements from April 2020 to September 2021. Earlier this fall, DHS asked the federal government

for another waiver and received approval through September 2022. However, individuals can volunteer to join the program to help them get the skills to work. The waiver is one of the reasons for lower enrollments over the last year.

Ms. Thousand reiterated that the financial statements tie to the audit. Financially, SWWDB is in good shape.

Motion made by Mr. Meyers, seconded by Mr. Podzilni, to approve the Fiscal Year 2020-21 draft audit report, including the draft Form 990, as presented. **Motion carried unanimously.**

5. **Appointment of Board Members**

Board member David Gaspar, formally of Miniature Precision Components (MPC) in Janesville, retired after MPC was acquired by Novares. Mr. Gaspar formed Tailored HR and gave up his position on the Board. Ms. Suda reached out to trade associations in the area for nominations. The Platteville Regional Chamber and Janesville Chamber of Commerce each submitted nominations. There is only one (1) position to fill and SWWDB administration received two (2) nominations. If SWCC members approve the addition of both nominations, SWWDB would have 26 Board members and the percentages would still meet Workforce Innovation and Opportunity Act (WIOA) requirements.

Kelly Sharpe is the Human Resources Director for Skyway Precision, Inc. in Platteville. However, Ms. Sharpe lives in Michigan. Ms. Suda noted that she would call-in for meetings, but also gets the opportunity to travel.

Andrew Marcotte is the Human Resources Manager for Blain's Farm & Fleet in Janesville. Mr. Marcotte's applicant form lists other local/national boards, committees or commissions he serves on. He has indicated that he looks forward to participating on the Board. Ms. Suda stated that Mr. Marcotte would represent the warehousing and logistics business area.

SWCC members need to appoint one (1) of these nominations, but can also appoint both. Mr. Keeney and Mr. Meyers are concerned about having representation from someone out-of-state and asked if this has been done before. Ms. Suda is not aware of any board member that has served on the SWWDB Board of Directors and lived outside of Wisconsin. Mr. Carter added that Ms. Sharpe's presence might bring a different perspective and asked if she ever visits Southwest Wisconsin. Ms. Suda said yes – Ms. Sharpe has been to the area.

Motion made by Mr. Meyers, seconded by Mr. Keeney, to appoint Andrew Marcotte to serve on the Southwest Wisconsin Workforce Development Board (SWWDB) Board of Directors. **Motion carried unanimously.**

Motion made by Mr. Podzilni, seconded by Mr. Meyers, to discuss Kelly Sharpe's SWWDB Member nomination papers. Ms. Sharpe works for Skyway Precision in Platteville. Mr. Carter stated that the Board does not have enough representation from small business owners or local businesses. There are many larger corporation representation. SWCC members discussed putting Ms. Sharpe's nomination on hold and finding representation from a small business. Ms. Suda reminded SWCC members that the Board's membership meets the requirements with Mr. Marcotte's approval. Ms. Suda will inform Ms. Sharpe that she was not selected, but SWWDB will keep her nomination papers on file. In the meantime, Ms. Suda will search for a small business representative.

Motion made by Mr. Meyers, seconded by Mr. Keeney, to oppose appointing Kelly Sharpe to the Southwest Wisconsin Workforce Development Board (SWWDB) Board of Directors due to her location. Ms. Sharpe’s application will be kept on file for future consideration. **Motion carried unanimously.**

6. Board Member Reappointment

SWWDB Board members are appointed to three-year terms on a calendar year cycle. Therefore, the end of the calendar year brings an end to the appointment term of several Board members.

The terms of the following Board members below are due to expire on December 31, 2021, and are recommended for re-appointment:

| Member | Title | Company / Organization | Industry / Representation |
|------------------|------------------------------|--|----------------------------|
| Dale Poweleit | Field Representative | Steamfitters Local 601 | Workforce - Labor |
| Chris Comella | Regional HR Business Partner | Inclusa | Healthcare |
| Ivan Collins | Member | Rock County Central Labor Council | Workforce -Labor |
| Michael Williams | Training Coordinator | Bricklayers and Allied Craftworkers of Wisconsin | Workforce - Apprenticeship |
| Heather McLean | Business Manager | Reddy Ag Service | Agriculture Service |
| Tracy Pierner | President | Blackhawk Technical College | Education |

Motion made by Mr. Podzilni, seconded by Mr. Keeney, to re-appoint the members above to a new three-year term beginning January 1, 2022 through December 31, 2024. **Motion carried unanimously.**

7. Southwest Wisconsin Counties Consortium Agreement

SWCC members reviewed the updated language in the Southwest Wisconsin Counties Consortium (SWCC) Agreement. The update addresses each county’s responsibility in the event SWWDB is assigned Workforce Innovation and Opportunity Act (WIOA) disallowed costs that cannot be addressed through SWWDB corporate reserves. The Department of Workforce Development (DWD) is requiring a language change as the current SWCC Agreement indicates the state can make a final assignment of disallowed costs, which is not allowable under WIOA.

The chief Local Elected Officials (LEOs) in a local area are liable for disallowed costs related to the misuse of WIOA funds. Ms. Suda assured SWCC members that SWWDB has corporate reserves to give SWWDB more flexibility with workforce needs that funding does not cover. It also protects the counties. Using SWWDB’s corporate reserves would have to be included in the SWCC Agreement. There is also an agreement between the LEOs and workforce board that will need to be reviewed. The SWCC Agreement is the agreement being addressed at this time.

If disallowed costs were identified, the Program Operator (Manpower) would reimburse SWWDB and in turn, SWWDB would reimburse the state. Ms. Suda added that there have been disallowed costs that Program Operators or SWWDB have picked up, but never the counties. The SWCC Agreement must also

address situations where the local elected officials do not agree. SWCC members were reminded that this agreement only covers obligations to WIOA, not the Foodshare Employment and Training (FSET) program or any new grant.

SWCC members will present the updated SWCC Agreement to their respective county as this is a liability for the county. Ms. Suda will put the information into the SWCC Agreement and send via email for the County's legal to review.

8. Leased Employee Program

Ms. Thousand presented a summary of SWWDB's leased employee program to SWCC members. It is summarized by contract/department, not by person. As of November 16, 2021, SWWDB has four (4) contracts: one (1) with Grant County, one (1) with Green County, and two (2) with Richland County.

The leased employee information shared with SWCC members is current through SWWDB's first fiscal quarter (July 1 – September 30). The information compares the third calendar quarter numbers in 2019, 2020, and 2021. In 2019, there were 58 leased employees with a gross billing of around \$193,000. In 2020, there were 27 leased employees with around \$189,000 in gross billing. In 2021, there were 36 leased employees with around \$212,000 in gross billing. The reason for the decrease from 2019 to 2020 was that there was no Rock 5.0 internship program due to COVID-19. There was also no Rock 5.0 internship program in 2021. There has been a lot of turnover in Richland and Green Counties.

Ms. Thousand noted that SWWDB charges an admin fee of 7% and has done so for a very long time.

9. Adjournment

Ms. Suda will update the SWCC Agreement and send it to SWCC members and will look into providing medical assistance in the Worker Advancement Initiative (WAI) grant.

Motion made by Mr. Keeney, seconded by Mr. Meyers, to adjourn the meeting at 1:08 p.m. **Motion carried unanimously.**

General Ledger System

SOUTHWEST WISCONSIN WORKFORCE DEVE
For User: d.thousand
Agency Balance Sheet

December 2021

Page: Page 1 of 1
Date: 2/11/2022
Time: 10:09:09 PM

| Account Description | Balance Amount | Totals |
|-------------------------------------|----------------|------------------------------|
| Assets: | | |
| 1000 CASH | \$860,658.23 | |
| 1100 GRANT CASH RECEIVABLE | \$504,203.04 | |
| 1202 PREPAID PLATTEVILLE RENT | \$2,387.00 | |
| 1203 PREPAID CORP. INSURANCES | \$4,183.00 | |
| 1207 PREPAID SUBSCRIPTIONS | \$13,690.83 | |
| 1220 PREPAID RENT OTHER | \$1,868.00 | |
| 1250 PREPAID HEALTH INSURANCE | \$32,421.58 | |
| 1252 PREPAID FLEXIBLE SPENDING | \$217.00 | |
| 1310 PREPAID ROCK COUNTY RENT | \$3,890.52 | |
| 1500 AUTOMOBILE PURCHASE | \$25,708.38 | |
| 1501 ACCUMULATED DEPRECIATION | (\$137,885.71) | |
| 1503 EQUIPMENT & FURNITURE | \$162,702.51 | |
| 1540 PAS REWRITE PROJECT | \$45,949.50 | |
| Total assets | | <u>\$1,519,993.88</u> |
| Liabilities: | | |
| 3003 ACCRUED VACATION | \$32,530.03 | |
| 3004 ACCRUED PAYROLL | \$99,983.18 | |
| 3089 FLEX PLAN MEDICAL | \$3,240.40 | |
| 3200 ACCOUNTS PAYABLE | \$128,737.28 | |
| Total liabilities | | <u>\$264,490.89</u> |
| Prior year fund balance | \$1,147,488.83 | |
| Current fund balance | \$108,014.16 | |
| Total liabilities and fund balance: | | <u><u>\$1,519,993.88</u></u> |

(Funds included: ALL)

General Ledger System

SOUTHWEST WISCONSIN WORKFORCE DEVE

For User: d.thousand

Agency Statement of Operations

December 2021

Page: Page 1 of 3

Date: 2/11/2022

Time: 10:51:55 PM

Revenues

| Account | -----Monthly----- | | | -----YTD----- | | | Annual estimated | Unrealized | Pct |
|-------------------------------|---------------------|-----------------------|----------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------|-----|
| | Estimated | Actual | Pct | Estimated | Actual | | | | |
| 5100 REVENUE | \$400,723.00 | \$814,600.59 | 203.28% | \$2,404,338.00 | \$2,062,885.68 | \$4,808,685.00 | \$2,745,799.32 | 42.90% | |
| 5110 LEASED EMPLOYEE REVENUE | \$70,607.00 | \$256,061.08 | 362.66% | \$423,642.00 | \$468,410.86 | \$847,295.00 | \$378,884.14 | 55.28% | |
| 5140 TICKET TO WORK REVENUE | \$4,194.00 | \$0.00 | 0.00% | \$25,164.00 | \$20,923.00 | \$50,337.00 | \$29,414.00 | 41.57% | |
| 5150 BENEFIT ANALYSIS REVENUE | \$4,194.00 | \$18,600.00 | 443.49% | \$25,164.00 | \$45,300.00 | \$50,338.00 | \$5,038.00 | 89.99% | |
| 5300 REVENUE INTEREST INCOME | \$87.00 | \$80.02 | 91.98% | \$522.00 | \$403.10 | \$1,050.00 | \$646.90 | 38.39% | |
| Total Revenues | \$479,805.00 | \$1,089,341.69 | 227.04% | \$2,878,830.00 | \$2,597,922.64 | \$5,757,705.00 | \$3,159,782.36 | 45.12% | |

Expenditures

| Account | -----Monthly----- | | | -----YTD----- | | | Annual budget | Unexpended | Pct |
|--------------------------------|-------------------|--------------|----------|----------------|----------------|----------------|----------------|------------|-----|
| | Budget | Expenditures | Pct | Budget | Expenditures | | | | |
| 6100 SALARIES | \$201,326.00 | \$312,591.09 | 155.27% | \$1,207,956.00 | \$1,253,001.09 | \$2,415,914.00 | \$1,162,912.91 | 51.86% | |
| 6110 P/R TAX FICA | \$15,401.00 | \$20,201.34 | 131.17% | \$92,406.00 | \$88,586.54 | \$184,817.00 | \$96,230.46 | 47.93% | |
| 6119 FRINGES | \$83.00 | (\$1,352.22) | 1629.18% | \$498.00 | \$1,109.07 | \$1,000.00 | (\$109.07) | 110.91% | |
| 6120 HEALTH INSURANCE | \$23,967.00 | \$21,732.00 | 90.67% | \$143,802.00 | \$130,234.58 | \$287,608.00 | \$157,373.42 | 45.28% | |
| 6122 UNEMPLOYMENT INSURANCE | \$1,014.00 | \$386.19 | 38.09% | \$6,084.00 | \$2,431.24 | \$12,178.00 | \$9,746.76 | 19.96% | |
| 6123 LIFE/DISABILITY INSURANCE | \$558.00 | \$570.80 | 102.29% | \$3,348.00 | \$3,352.23 | \$6,701.00 | \$3,348.77 | 50.03% | |
| 6130 DENTAL INSURANCE | \$1,676.00 | \$1,707.44 | 101.88% | \$10,056.00 | \$10,207.95 | \$20,113.00 | \$9,905.05 | 50.75% | |
| 6140 TRAVEL IN WDA | \$3,428.00 | \$4,174.01 | 121.76% | \$20,568.00 | \$24,297.24 | \$41,140.00 | \$16,842.76 | 59.06% | |
| 6155 MEALS | \$166.00 | \$27.25 | 16.42% | \$996.00 | \$739.23 | \$2,000.00 | \$1,260.77 | 36.96% | |
| 6156 LODGING | \$291.00 | \$119.00 | 40.89% | \$1,746.00 | \$278.90 | \$3,500.00 | \$3,221.10 | 7.97% | |
| 6160 401(K) | \$7,500.00 | \$6,548.54 | 87.31% | \$45,000.00 | \$41,698.63 | \$90,000.00 | \$48,301.37 | 46.33% | |
| 6170 STAFF TRAIN/DEVELOPMENT | \$333.00 | \$0.00 | 0.00% | \$1,998.00 | \$20,636.15 | \$4,000.00 | (\$16,636.15) | 515.90% | |
| 6172 DUES AND MEMBERSHIPS | \$583.00 | \$25.00 | 4.29% | \$3,498.00 | \$3,530.00 | \$7,000.00 | \$3,470.00 | 50.43% | |
| 6250 OFFICE SUPPLIES | \$2,500.00 | \$1,442.16 | 57.69% | \$15,000.00 | \$13,738.83 | \$30,000.00 | \$16,261.17 | 45.80% | |
| 6255 AUDIO/WISLINE | \$125.00 | \$202.44 | 161.95% | \$750.00 | \$550.77 | \$1,500.00 | \$949.23 | 36.72% | |
| 6257 JOB FAIR EXPENSES | \$41.00 | \$0.00 | 0.00% | \$246.00 | \$358.58 | \$500.00 | \$141.42 | 71.72% | |
| 6261 EQUIPMENT UNDER \$5000 | \$2,500.00 | \$0.00 | 0.00% | \$15,000.00 | \$7,850.98 | \$30,000.00 | \$22,149.02 | 26.17% | |
| 6267 COPIER RENTAL | \$458.00 | \$422.95 | 92.35% | \$2,748.00 | \$2,660.58 | \$5,500.00 | \$2,839.42 | 48.37% | |
| 6270 IT SOFTWARE | \$1,166.00 | \$1,125.00 | 96.48% | \$6,996.00 | \$6,750.00 | \$14,000.00 | \$7,250.00 | 48.21% | |
| 6272 IT EQUIPMENT - NETWORK | \$333.00 | \$0.00 | 0.00% | \$1,998.00 | \$0.00 | \$4,000.00 | \$4,000.00 | 0.00% | |
| 6273 IT EQUIPMENT - OTHER | \$41.00 | \$0.00 | 0.00% | \$246.00 | \$0.00 | \$500.00 | \$500.00 | 0.00% | |
| 6274 LICENSES | \$308.00 | \$83.35 | 27.06% | \$1,848.00 | \$510.00 | \$3,700.00 | \$3,190.00 | 13.78% | |
| 6309 FACILITIES | \$0.00 | \$0.00 | 0.00% | \$0.00 | \$100.00 | \$0.00 | (\$100.00) | 0.00% | |

General Ledger System

SOUTHWEST WISCONSIN WORKFORCE DEVE

For User: d.thousand

Agency Statement of Operations

December 2021

Page: Page 2 of 3

Date: 2/11/2022

Time: 10:51:56 PM

Expenditures

| Account | -----Monthly----- | | | -----YTD----- | | | Annual budget | Unexpended | Pct |
|------------------------------|-------------------|--------------|---------|---------------|--------------|--------------|---------------|------------|-----|
| | Budget | Expenditures | Pct | Budget | Expenditures | | | | |
| 6310 RENT | \$8,333.00 | \$6,277.52 | 75.33% | \$49,998.00 | \$48,582.08 | \$100,000.00 | \$51,417.92 | 48.58% | |
| 6311 STORAGE RENTAL | \$1,216.00 | \$1,215.00 | 99.92% | \$7,296.00 | \$7,290.00 | \$14,600.00 | \$7,310.00 | 49.93% | |
| 6312 CLEANING/JANITORIAL | \$350.00 | \$250.00 | 71.43% | \$2,100.00 | \$1,050.00 | \$4,200.00 | \$3,150.00 | 25.00% | |
| 6313 P.O. BOX RENTAL | \$33.00 | \$0.00 | 0.00% | \$198.00 | \$296.00 | \$400.00 | \$104.00 | 74.00% | |
| 6317 MOVING EXPENSE | \$0.00 | \$0.00 | 0.00% | \$0.00 | \$588.65 | \$0.00 | (\$588.65) | 0.00% | |
| 6330 TELEPHONE | \$625.00 | \$907.71 | 145.23% | \$3,750.00 | \$2,560.73 | \$7,500.00 | \$4,939.27 | 34.14% | |
| 6331 GARBAGE REMOVAL | \$33.00 | \$0.00 | 0.00% | \$198.00 | \$0.00 | \$400.00 | \$400.00 | 0.00% | |
| 6340 POSTAGE | \$833.00 | \$158.30 | 19.00% | \$4,998.00 | \$4,064.79 | \$10,000.00 | \$5,935.21 | 40.65% | |
| 6341 SERVICE FEES | \$666.00 | \$615.60 | 92.43% | \$3,996.00 | \$4,135.66 | \$8,000.00 | \$3,864.34 | 51.70% | |
| 6342 SUBSCRIPTIONS | \$583.00 | \$120.00 | 20.58% | \$3,498.00 | \$836.16 | \$7,000.00 | \$6,163.84 | 11.95% | |
| 6343 BOARD | \$416.00 | \$719.12 | 172.87% | \$2,496.00 | \$949.84 | \$5,000.00 | \$4,050.16 | 19.00% | |
| 6351 CELL PHONE | \$1,708.00 | \$1,216.02 | 71.20% | \$10,248.00 | \$8,188.07 | \$20,500.00 | \$12,311.93 | 39.94% | |
| 6352 INTERNET | \$1,041.00 | \$2,149.13 | 206.45% | \$6,246.00 | \$7,265.28 | \$12,500.00 | \$5,234.72 | 58.12% | |
| 6353 NETWORK CONNECTIVITY | \$3,333.00 | \$1,900.00 | 57.01% | \$19,998.00 | \$20,425.00 | \$40,000.00 | \$19,575.00 | 51.06% | |
| 6370 ADVERTISING | \$500.00 | \$0.00 | 0.00% | \$3,000.00 | \$848.85 | \$6,000.00 | \$5,151.15 | 14.15% | |
| 6371 BACKGROUND CHECKS | \$29.00 | \$0.00 | 0.00% | \$174.00 | \$134.00 | \$350.00 | \$216.00 | 38.29% | |
| 6410 LEGAL | \$250.00 | \$0.00 | 0.00% | \$1,500.00 | \$0.00 | \$3,000.00 | \$3,000.00 | 0.00% | |
| 6420 AUDIT | \$1,104.00 | \$0.00 | 0.00% | \$6,624.00 | \$13,250.00 | \$13,250.00 | \$0.00 | 100.00% | |
| 6433 CONTRACTED SUPPORT | \$4,166.00 | \$3,244.85 | 77.89% | \$24,996.00 | \$19,469.00 | \$50,000.00 | \$30,531.00 | 38.94% | |
| 6503 WORKER'S COMPENSATION | \$1,208.00 | \$1,612.58 | 133.49% | \$7,248.00 | \$9,675.48 | \$14,500.00 | \$4,824.52 | 66.73% | |
| 6504 MULTI-PERIL | \$166.00 | \$143.75 | 86.60% | \$996.00 | \$862.50 | \$2,000.00 | \$1,137.50 | 43.13% | |
| 6507 CORPORATE INSURANCES | \$916.00 | \$957.39 | 104.52% | \$5,496.00 | \$5,734.55 | \$11,000.00 | \$5,265.45 | 52.13% | |
| 6580 DEPRECIATION | \$2,750.00 | \$1,354.98 | 49.27% | \$16,500.00 | \$8,129.88 | \$33,000.00 | \$24,870.12 | 24.64% | |
| 6602 COMPANY CAR INSURANCE | \$154.00 | \$149.58 | 97.13% | \$924.00 | \$897.48 | \$1,850.00 | \$952.52 | 48.51% | |
| 6603 COMPANY CAR GAS | \$60.00 | \$34.77 | 57.95% | \$360.00 | \$78.39 | \$720.00 | \$641.61 | 10.89% | |
| 6604 COMPANY CAR MAINTENANCE | \$83.00 | \$0.00 | 0.00% | \$498.00 | \$884.11 | \$1,000.00 | \$115.89 | 88.41% | |
| 6610 SUBCONTRACTOR EXPENSE | \$37,500.00 | \$43,294.22 | 115.45% | \$225,000.00 | \$256,163.23 | \$450,000.00 | \$193,836.77 | 56.93% | |
| 6701 PARTICIPANT SUPPORT | \$41,666.00 | \$31,852.91 | 76.45% | \$249,996.00 | \$178,162.94 | \$500,000.00 | \$321,837.06 | 35.63% | |
| 6703 ASSESSMENTS | \$2,083.00 | \$560.00 | 26.88% | \$12,498.00 | \$5,705.00 | \$25,000.00 | \$19,295.00 | 22.82% | |
| 6709 INCENTIVES | \$10,416.00 | \$13,200.00 | 126.73% | \$62,496.00 | \$87,200.00 | \$125,000.00 | \$37,800.00 | 69.76% | |
| 6735 35% TRAINING | \$16,250.00 | \$412.05 | 2.54% | \$97,500.00 | \$116,935.99 | \$195,000.00 | \$78,064.01 | 59.97% | |

General Ledger System

SOUTHWEST WISCONSIN WORKFORCE DEVE

For User: d.thousand

Agency Statement of Operations

Page: Page 3 of 3

Date: 2/11/2022

Time: 10:51:57 PM

December 2021

Expenditures

| Account | -----Monthly----- | | | -----YTD----- | | Annual budget | Unexpended | Pct |
|---------------------------|---------------------|---------------------|----------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------|
| | Budget | Expenditures | Pct | Budget | Expenditures | | | |
| 6736 35% TRAINING SUPPORT | \$10,833.00 | \$9,683.88 | 89.39% | \$64,998.00 | \$64,922.23 | \$130,000.00 | \$65,077.77 | 49.94% |
| 6740 CUSTOMIZED TRAINING | \$0.00 | \$0.00 | 0.00% | \$0.00 | \$2,000.00 | \$0.00 | (\$2,000.00) | 0.00% |
| Total Expenditures | \$413,102.00 | \$492,035.70 | 119.11% | \$2,478,612.00 | \$2,489,908.48 | \$4,957,441.00 | \$2,467,532.52 | 50.23% |
| Excess (Deficit) | \$66,703.00 | \$597,305.99 | | \$400,218.00 | \$108,014.16 | \$800,264.00 | \$692,249.84 | |

(Funds included: ALL)

SWWDB Budget Modifications Since the 12/08/2021 Board Meeting

| Item | Admin | Program | Amount |
|---|------------------|------------------|--------------------|
| 2021.22 Budget - Approved Revenue | 542,844 | 4,753,067 | \$5,295,911 |
| Changes to PY21 Funds (Adjust to Actual) | | | |
| DWD Set Aside Projects - Docusign max grant | | 270 | \$270 |
| Department of Corrections - new funds for PDCI Job Center | 3,500 | 31,500 | \$35,000 |
| Department of Corrections - new funds for Boscobel work | 1,394 | 12,547 | \$13,941 |
| WIOA PY20 DW - transfer #3 to WIOA Adult | | (30,000) | (\$30,000) |
| WIOA PY20 Adult - transfer #3 from WIOA DW | | 30,000 | \$30,000 |
| Employment Recovery DWG - rec'd a second year of funding | 22,727 | 227,273 | \$250,000 |
| Hufcor, Inc. Rapid Response Dislocation Grant - additional funding via mod | 623 | 6,235 | \$6,858 |
| Durr Universal Rapid Response Dislocation Grant - additional funding via mod | 231 | 2,313 | \$2,544 |
| WIOA PY20 DW - transfer #2 to WIOA Adult | | (40,000) | (\$40,000) |
| WIOA PY20 Adult - transfer #2 from WIOA DW | | 40,000 | \$40,000 |
| WIOA PY21 Admin - Adjust to Actual Q2 - Q4 Award | (3) | | (\$3) |
| WIOA PY21 Adult - Adjust to Actual Q2 - Q4 Award | | 2 | \$2 |
| WIOA PY21 DW - Adjust to Actual Q2 - Q4 Award | | 1 | \$1 |
| Workforce Advancement Initiative - new award (\$1,610,243 through 9/30/23) | 146,386 | 1,463,857 | \$1,610,243 |
| Youth Apprenticeship - additional funding awarded | | 9,357 | \$9,357 |
| Independent Living / Foster Care - Stimulus auto match modification | | 4,000 | \$4,000 |
| Pathway 2 Home - new award (\$3,858,861 through 12/31/2024) | 385,886 | 3,472,975 | \$3,858,861 |
| Department of Corrections - adjust to actual award | 300 | 2,700 | \$3,000 |
| Rapid Response Annual Allotment - adjust to actual | (182) | (1,642) | (\$1,824) |
| Hufcor, Inc. Rapid Response Dislocation Grant - new | 751 | 7,510 | \$8,261 |
| Durr Universal Rapid Response Dislocation Grant - new | 359 | 3,590 | \$3,949 |
| Youth Apprenticeship - adjust to actual award, additional funds from Intent to Award | | 2,456 | \$2,456 |
| Modified Revenues | 1,104,816 | 9,998,011 | 11,102,827 |
| Net Change | 561,972 | 5,244,944 | 5,806,916 |
| Changes to PY20 Funds (Affects Planned Reserve / Carryover) - for informational purposes only | | | |
| Department of Corrections - adjust to actual final/close out | 237 | 5,887 | \$6,124 |
| Foster Care / IL - Add full Stimulus Supportive Services for direct stimulus payments (rec'd full modification request) | | 12,000 | \$12,000 |



Southwest Wisconsin Workforce Development Board
1370 N. Water Street, Platteville, WI 53818 • (608) 342-4220

SWWDB Member Applicant Form

In accordance with the Workforce Innovation and Opportunity Act (WIOA), signed into law on July 22, 2014, the Southwest Wisconsin Workforce Development Area (Grant, Green, Iowa, Lafayette, Richland and Rock Counties) has established a Workforce Development Board (WDB) which assists in strategic planning, oversight, and evaluation of the local workforce development area. This includes promoting effective outcomes consistent with statewide goals, objectives, and negotiated local performance. WDB members are appointed by the Southwest Wisconsin Counties Consortium (SWCC) to represent specified categories of the community as listed below. Applicants may select more than one category.

Individuals interested in serving on the SWWDB must complete and submit this **Application** along with a copy of their **current resume** to the SWWDB Chief Executive Officer (Rhonda Suda, r.suda@swwdb.org, Contact Number: 608-314-3300, Ext. 305). In addition, this Application and the related Nomination Form(s), if any, may be subject to public disclosure.

Personal Information

| | | | |
|------------|--|----------------------|-----------------------------------|
| Name: | Keith | County of Residence: | <i>Rock</i> |
| Address: | 2031 E. Waterford Dr. Beloit, WI. 53511 | | |
| Telephone: | 608-751-7503 | Email: | Kkruse@tricorinsurance.com |

Occupational Information:

| | | | |
|------------------|---|--------|--|
| Industry Sector: | Insurance | | |
| Employer: | Tricor Insurance | Title: | Partner/Vice President of Business Accounts |
| Address: | 2600 N. Pontiac Dr. Janesville WI 53545 | | |
| Telephone: | 608-751-7503 | Email: | kkruse@tricorinsurance.com |

Why are you interested in volunteering on the Southwest Wisconsin Workforce Development Board?

To be able to help understand and work together to keep strong the workforce in southwest Wisconsin.

List any other local/national boards, committees or commissions you presently serve on.

Currently I work on the YMCA advisory committee, the CRMF foundation board, and the Beloit Health System foundation board.

Eligibility Certification (Indicate below each membership category for which you are applying. You may mark more than one category, however you must certify your qualifications for each category for which you are applying. Applications for Business Member, Labor Organization, Adult Education and Literacy and/or Higher Education must be accompanied by a completed Nomination form from an appropriate nomination organization.)

Business Member: I hereby certify, by my initials here: KK, that I am: (i) The owner, chief executive, operating officer or other leader with optimum policy-making or hiring authority for the business (listed below); (ii) From a business that provides employment opportunities in the region (employees other than the owner) that include, at a minimum, high-quality, work-relevant training and development; (iii) From a business that represents an in-demand industry sector or occupation in the local area (to be verified by staff using labor market information); and (iv) Being nominated by a local business organization or business trade association.

Name of Business: Tricor Insurance _____

Do you represent a "small business": Yes No

SWWDB is an equal opportunity employer/service provider. Auxiliary aids and services are available upon request to individuals with disabilities.

A proud partner of the American Job Center network

Board Applicant Form, updated 08.20.18

ENCLOSURE 5

Labor Organization: I hereby certify, by my initials here: _____, that I am: (i) A member or training director of the labor organization listed below; and (ii) Being nominated by a local labor federation. (Nomination Form from must be attached to this Application.)

Name of Organization: _____

Joint Labor-Management Apprenticeship Program: I hereby certify, by my initials here: _____, that I am a representative from the joint labor-management apprenticeship or a representative of an apprenticeship program in the local area.

Name of Organization/Program: _____

Community-based Organization: I hereby certify, by my initials here: _____, that I am a representative of a community-based organization (listed below) with demonstrated experience and expertise in addressing the employment needs of (i) Individuals with barriers to employment, including an organization that serves veterans or provides or supports competitive integrated employment for individuals with disabilities; and/or (ii) Eligible youth, including representatives of organizations that serve out-of-school youth.

Name of Organization: _____

Adult Education and Literacy: I hereby certify, by my initials here: _____, that I am: (i) A representative of an eligible provider (listed below) administering adult education and literacy activities under Title II of WIOA; and (ii) Being nominated by a provider of adult education and literacy activities under Title II of WIOA. (Nomination Form from must be attached to this Application)

Name of Institution: _____

Higher Education: I hereby certify, by my initials here: _____, that I am (i) a representative of an institution of higher education (listed below) providing workforce investment activities (including community colleges) ; and (ii) Being nominated by an institution of higher education providing workforce investment activities (including community colleges). (Nomination Form from must be attached to this Application)

Name of Institution: _____

Economic and Community Development: I hereby certify, by my initials here: _____, that I am a representative of an economic and community development entity.

Name of Entity: _____

Other Required Board Membership by (state, federal or local) statute and/or as required and appointed by the SWCC:

State Employment Office / Job Service (appointed by Governor)

Vocational Rehabilitation (appointed by Governor)

Unemployment (appointed by Governor)

SWWC Chief Local Elected Official (SWCC By-Laws)

I hereby certify that all statements in this application are true and complete to the best of my knowledge. I further certify that if I am appointed, I will serve fairly, impartially and to the best of my ability.

Keith Kruse

Signature of Applicant

01/21/2022

Date

Southwest Wisconsin Counties Consortium

The members of the Southwest Wisconsin Counties Consortium (SWCC) has reviewed this nomination at the _____ (enter date) meeting of Consortium members.

The SWCC authorizes appointment: Yes No



Southwest Wisconsin Workforce Development Board
1370 N. Water Street, Platteville, WI 53818 • (608-) 342-4220

SWWDB Nomination Form

As mandated by the Workforce Innovation and Opportunity Act (WIOA) of 2014 (H.R. 803 Sec 107), individuals representing Business, Workforce, Adult Education and Literacy or Higher Education sectors on the Southwest Wisconsin Workforce Development Board (SWWDB) must be nominated by qualified organizations, as detailed below. To be considered for appointment to the SWWDB in the above mentioned categories, applicants provide a completed **Nomination Form**, along with a **resume** and completed **Application** to the SWWDB Chief Executive Officer (Rhonda Suda, r.suda@swwdb.org, Contact Number: 608-314-3300, Ext. 305). All appointments to the SWWDB are made by the Southwest Wisconsin Counties Consortium (SWCC). Organizations may nominate more than one candidate for SWCC consideration.

Nominee (Applicant) Information

| | | | |
|--------------------------|---|---|--|
| Name: | Keith Kruse | | |
| Telephone: | 608-751-7503 | | |
| WDB Membership Category: | <input checked="" type="checkbox"/> Business | <input type="checkbox"/> Higher Education | |
| | <input type="checkbox"/> Workforce / Labor | <input type="checkbox"/> Other | |
| | <input type="checkbox"/> Adult Education Literacy | | |

Nominating Organization: Please complete this section and return this form to the nominee/applicant for submission to the SWCC.

| | | | |
|---------------|------------------------------------|--------|----------------------------------|
| Organization: | Greater Beloit Chamber of Commerce | | |
| Contact Name: | Aimee Thurner | Title: | Executive Director |
| Telephone: | 608-365-8835 | Email: | aimeet@greaterbeloit-chamber.org |
| Address: | 635 Third St., Beloit, WI 53511 | | |

We hereby nominate the above named nominee in the membership category indicated and certify the following (*one or more categories may be selected as appropriate*):

Business:

- We are a local business organization and/or business trade association.
- The Nominee is (i) the owner, chief executive, or operating officer with optimum policy-making or hiring authority; (ii) from a business that provides employment opportunities in the region that include, at a minimum, high-quality, work-relevant training and development; and (iii) from a business that represents in-demand industry sector(s) or occupation(s) in the local area.
- Nominee (*circle one*) DOES – or – DOES NOT represent a small business.

Workforce / Labor:

- We are a local labor federation.
- The Nominee is a representative of a labor organization.

Adult Education / Literacy:

- We are an eligible provider administering adult education and literacy activities under Title II of WIOA.
- The Nominee is a representative of an eligible provider administering adult education and literacy activities under Title II of WIOA.

Higher Education:

- We are an institution of higher education providing workforce investment activities (including community colleges).
- The Nominee is a representative of an institution of higher education providing workforce investment activities (including community colleges).

Government **Economic Development** **Community Development** **Community Based Organization**

I certify that all of the information above true and that I have the authority to make this nomination on behalf of the organization named above.

Aimee Thurner
Authorized Signature of Nominating Organization

1/25/2022
Date

SWWDB is an equal opportunity employer/service provider. Auxiliary aids and services are available upon request to individuals with disabilities.

A proud partner of the American Job Center network

Board Nomination Form, updated 8.20.2018

Keith Kruse

Tricor Insurance

2600 Pontiac Dr. Janesville WI 53545

I have a lot of history in Janesville, a 1975 graduate of Parker High School. I worked through high school at ELRA Bowl and did that until I stated in the insurance business in 1978. I have been in this industry ever since.

Professional History

Mansur Chapin Insurance (Early years) Sales

Hart, Kruse, & Boutelle (1981 – 1995) Operations Director

Kruse Company (Madison) (1995-1999) I started a new agency from scratch

Tricor Insurance (1999-present) I merged my company into Tricor. I worked in operations for first several years, since 2002 have been in commercial insurance sales.

Community Activity

Over the years I have completed many insurance related continuing education programs. I currently hold designations for CPCU, CIC, and CRM, all of which are specialized training for my field.

I have served on many boards over those years, YMCA's, Economic development boards, not-for profit boards, Insurance carrier advisory councils. I currently serve on two foundation boards, Colonel Robert H. Morse Foundation, and Beloit Health System Foundation.

I continue to active in as many community functions as I can in Janesville, Milton, Beloit, and Rock County in general.

Thank you for your consideration.

Department of Workforce Development
Employment and Training Division
Bureau of Workforce Training
201 E. Washington Avenue
P.O. Box 7972
Madison, WI 53707
Telephone: (608) 266-5370
Fax: (608) 267-0330
Email: dwdet@dwd.wisconsin.gov

A proud partner of the [AmericanJobCenter](#) network



Tony Evers, Governor
Amy Pechacek, Secretary-designee

November 22, 2021

Art Carter, Green County Board Chair
N2659 Richland Road
Monroe, WI 53566

Dear Mr. Carter:

We have completed our review of the Workforce Board membership materials submitted for certification of the Southwest Wisconsin Workforce Development Board (SWWDB). At this time, the Southwest Wisconsin Workforce Development Board is certified for the period from January 1, 2022 through June 30, 2023.


The Workforce Innovation and Opportunity Act (WIOA) Section 107 requires that the Chief Elected Official (CEO) in each of the local areas must appoint a local workforce board comprised of individuals from certain areas of business, government, and non-profit agencies. Section 107(c)(2) requires that, every two years, the State recertify each workforce development board.

On September 21, 2021 the Department of Workforce Development Division of Employment and Training (DWD-DET) requested the following documents be submitted by November 1, 2021:

- Completed Membership Chart,
- Copies of All Members' Signed Conflict of Interest Disclosure Forms.

If you have any questions, please contact the Local Program Liaison assigned to your local area, Tara Cowe-Spigai at taraa.cowespigai@dwd.wisconsin.gov.

Sincerely,

DocuSigned by:

D0ADA3B21EC0420...
Annette Meudt
Director, Bureau of Workforce Training

cc: Maria Lauck, Southwest WDB Chair
Rhonda Suda, Southwest Wisconsin WDB Director
Tara Cowe-Spigai, Local Program Liaison