

1997-98 SESSION
COMMITTEE HEARING
RECORDS

Committee Name:

Joint Committee on
Finance
(JC-Fi)

Sample:

- Record of Comm. Proceedings
- 97hrAC-EdR_RCP_pt01a
- 97hrAC-EdR_RCP_pt01b
- 97hrAC-EdR_RCP_pt02

- Appointments ... Appt
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- Hearing Records ... HR
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- Miscellaneous ... Misc
- 97hr_JC-Fi_Misc_6-23-98 Mtg_pt03
- Record of Comm. Proceedings ... RCP
-

June 23, 1998

13.10 m/s



STATE OF WISCONSIN

Department of Employee Trust Funds

Eric O. Stanchfield
Secretary
801 West Badger Road
P.O. Box 7931
Madison, WI 53707-7931

May 27, 1998

HONORABLE SENATOR TIMOTHY WEEDEN
HONORABLE REPRESENTATIVE JOHN GARD
CO-CHAIRS, JOINT COMMITTEE ON FINANCE
STATE CAPITOL
MADISON WI 53702

MAY 28 1998

Subject: Section 13.101 request from the Department of Employee Trust Funds for Funding of the Health Insurance Database and Consultant Services for Fiscal Year 1998-99.

Dear Senator Weeden and Representative Gard:

On behalf of the Group Insurance Board (GIB) and the Department of Employee Trust Funds (Department), I request that the Joint Committee on Finance approve \$120,400 SEG for continued use of the health insurance database first authorized in 1991 Wisconsin Act 269, and \$20,000 SEG for consultant services to evaluate the best way of collecting and reporting information on state group health insurance plan enrollee complaints.

Background

The Department has engaged a private contractor to design, implement and serve as administrator of a health care membership database. This membership database enables the Department to track who is covered under each subscriber's health policy; extract summary data on individuals and groups which allows the Department to more accurately model the fiscal impact of proposed legislation; and create statistical analyses and trend reports which the actuary, the GIB, and the Department use to manage the program and the premium negotiation process.

In 1997 Wisconsin Act 27, the Legislature directed the Department to review the feasibility, possible benefits, and potential costs of migrating the database from the third-party vendor's proprietary system to a Department system and to submit its analysis to the Joint Committee on Finance.

Analysis of Placement Options

The Department has conducted a thorough cost-benefit analysis to determine the most cost-effective location for the health insurance database. As part of this analysis, the Department reaffirmed the system's essential business requirements. The four alternatives evaluated by the Department were: 1) Maintain current location and functionality of the system; 2) Maintain the current location but improved system functionality; 3) Migrate the database to the Department's Local Area Network with improved functionality; and 4) Migrate the database to the Department of Administration's (DOA) InfoTech mainframe computer with improved functionality.

Honorable Senator Timothy Weeden
Honorable Representative John Gard
May 20, 1998
Page 2

The study concluded that migration of the system to DOA InfoTech's mainframe would facilitate interaction with the Department's other data and image systems, and also enable electronic communication with the state and local employer payroll systems. The mainframe solution also provides the lowest operating costs of the alternatives.

The complete study is attached for your information.

Summary

Provision of funding by the Legislature in the last five years has enabled the GIB and the Department to develop a database with which to better manage the cost of health insurance for state and local government employers and employees. The Department requests the release of the third-party vendor's operating cost for next fiscal year in the amount of \$120,400 SEG. The Department will address the migration of the Health Insurance Database to DOA InfoTech in a 1999 - 2001 biennial budget request.

In addition, the Department requests release of \$20,000 SEG one-time funding to contract with a consultant to evaluate the best way of collecting and reporting information on state group health insurance plan enrollees' complaints. This proposal is an outgrowth of a March, 1996 Legislative Audit Bureau report recommending the Department implement procedures to document and analyze all complaints received, including a comparison of health plan complaints received by the Office of Commissioner of Insurance.

Thank you for your consideration of this request. I have asked Dave Hinrichs, Executive Assistant and Tom Korpady, Administrator of the Division of Insurance Services, to present this request to the Committee and answer any questions that you may have.

Sincerely,



Eric O. Stanchfield
Secretary
(608) 266-0301
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Attachment

Department of Employee Trust Funds
Report for Health Insurance - s.13.101
May 27, 1998

Background

The 1992 budget adjustment act, and subsequent biennial budget processes, have provided funding for the Department of Employee Trust Funds (Department) to contract with a third-party vendor to develop and maintain the Department's health insurance database. In 1997 Wisconsin Act 27, the Legislature directed the Department to review the feasibility, possible benefits, and potential costs of migrating the database from the vendor's proprietary system to the Department, and to submit its analysis to the Joint Committee on Finance.

Issue

What is the most cost-effective location for the Department's health insurance database? As part of this analysis, the Department will also confirm the essential business requirements for the system.

Methodology

The Department appointed a team to study four alternatives to our current health insurance membership and complaint database systems. Team members were chosen based on their relevant expertise, and included Don Cleven, Division of Insurance Services, Third-Party Contract Monitor; Joanne Cullen, Budget Director; Jon Forde, Information Technology Applications Development Director; Catherine Duster, Health Insurance Data Manager; Tom Machaj, Division of Employer Services, the Department's designated technical contact for the current vendor; and Kari Jo Zika, the Department's Quality Assurance Manager.

The four alternatives considered were:

- 1) Maintain current location and functionality of the system;
- 2) Maintain the current location but improved system functionality;
- 3) Migrate the database to the Department's Local Area Network (LAN) with improved functionality; and
- 4) Migrate the database to the Department of Administration's (DOA) InfoTech mainframe computer with improved functionality.

Each team member independently evaluated the alternatives against eight criteria: Access; Design of Computer Screens; Data Integrity; Complaint Database Integration; Report Development; Database Design and Management; Compatibility with Existing Systems; and Electronic Transmission of Data. Attachment 1 provides a complete description of each criterion, and associated benchmark.

Attachment 3 provides the complete details of the technical and cost evaluation.

Recommendation

The recommended alternative is the migration of the database to the Department of Administration's (DOA) InfoTech mainframe computer with improved functionality. This alternative received the highest technical scores for functionality with the lowest operational cost (\$17 per user per month) of any alternative. The total cost of operation for the proposed system at, \$153 per user per month, compares favorably with the other alternatives for an enhanced system.

The proposed system will consolidate the enrollment, complaint and employer health insurance databases into one centralized and integrated database which can be linked to the Department's primary databases and electronic image and workflow system of Wisconsin Retirement System (WRS) participant records. DOA will provide security, back-up and recovery, help desk functions, and upgrading of software and hardware.

Analysis of Options

Option 1. Maintain current location and functionality of the system.

Description

The health enrollment, complaint, and employer databases are operated on a proprietary system owned by the third-party vendor (Grant Thornton, LLP). The vendor maintains the database and provides the Department ongoing access to it.

Assessment Against Criteria

Access. Access is currently limited to 25 users due to response time constraints. If this alternative is selected, access will be expanded to 130 users through an upgraded communication line. Employers do not have access to the system.

Design of computer screens. The current computer screens are not designed using the Graphical User Interface (GUI) standard. The screens do not facilitate efficient data entry. Names of data fields are not standard from screen to screen, and movement between screens is time-consuming. These limitations decrease employee productivity, increase training time, and increase the potential for data-entry errors.

Data integrity. Minimal high level edits and audits are in place.

Complaint database integration. The complaint database is not linked to the membership/enrollment database. Complaint information, including subscriber, dependent identification data and employment and coverage data, must be entered on-line. Consequently, participant data must be entered twice and cannot be edited against the enrollment data.

Report development. The standard reports do not meet the needs of current users. The ad hoc report function is used extensively by a few employees despite being cumbersome and requiring multiple uploads and downloads of the same data. The employer billing program uses a stand-alone system which requires duplicative data entry of certain information.

Database design and maintenance. The lack of integration between the enrollment, complaint, and employer databases makes queries and modifications to the system very time-consuming. Because the system is operated by a third-party vendor, department staff are not able to perform routine maintenance and enhancements to the system.

Compatibility with current/planned systems. The vendor's hardware and software infrastructure is not able to communicate with the Department's primary databases or the electronic image system of WRS participant records which are on DOA InfoTech's mainframe computer. The vendor's proprietary hardware and software do not conform to DOA standards.

Electronic transmission of data. Electronic transmission of data from state and local employer payroll systems and enrollment information is desired in the future to eliminate the need for most of the manual data entry. The current vendor is not equipped to handle various data transmission protocols and the anticipated volumes involved with electronic transmission of data.

Final Score and Summary Observations

Each evaluation criterion has been assigned a score between 0 and 100%, with 100% indicating the highest technical score possible. The Technical - Overall score is the average of the scores from the eight evaluation criteria. Each rater independently scored each criterion. The assigned scores are an average of the individual raters evaluation.

Criteria	Score
1. Access	23%
2. Design of Computer Screens	13%
3. Data Integrity	30%
4. Complaint Database Integration	20%
5. Report Development	20%
6. Database Design and Management	23%
7. Compatibility With Existing Systems	17%
8. Electronic Transmission of Data	17%
9. Technical - Overall	21%

Cost

One-time systems development costs are amortized over three years. Per user costs are based on 130 users.

One-Time Expenses		
	Total	Per User / Month
Development	\$ 0	\$ 0
Ongoing Monthly Expenses		
Operating Expenses	11,400	88
Data Entry	3,375	26
Total Ongoing Expenses	\$ 14,775	\$ 114
Total Cost of Operation		
Total cost per user per month		\$ 114

Summary Observations

This option is a continuation of our current system which has allowed the Group Insurance Board and the Department to better manage the cost and quality of health insurance coverage for employees. However, this option does not allow the flexibility to accommodate the essential Department business needs. For example, the vendor cannot provide for the electronic transmission of the health insurance applications from employers to the Department. If this were possible, it would significantly reduce data entry time and keying errors.

Option 2. Maintain the current location but improved system functionality.

Description

This option would integrate the enrollment, complaint, and employer databases into one centralized database operated on a proprietary system owned by the third-party vendor. Enhancements would be made to screen design, data integrity edits and management reports.

Assessment Against Criteria

Access. Up to 130 employees could access the system to assist in answering health insurance related questions. Employers would not have access to the vendor's proprietary system.

Design of the computer screens. The database would be designed to provide a GUI-like interface using standard terminology. The screen would be designed to facilitate data entry. The GUI interface would make movement within and between screens easier and less time consuming.

Data integrity. Additional front-end edits and more sophisticated data field edits would facilitate exception reporting and problem resolution. These edits would reduce the effort necessary to correct data and improve the validity of the data.

Complaint database integration. The complaint database would be fully integrated with the enrollment database eliminating duplicative data entry and synchronization concerns.

Report development. Standardized reports would be modified to meet strategic business requirements. Ad hoc queries would be facilitated by using the datamart database design concept. The query tool would be part of the vendor's proprietary system and would not meet DOA standards for state agencies. Integration of the employer database would allow development of an automated employer reporting system that would calculate premium payments, reconcile them to employer remittances, and generate invoices.

Database design and management. The integration of the health insurance, complaint and employer databases would enhance the productivity of the system by reducing data entry, synchronization problems, and training time. The data warehouse concept has proven to be effective in maintaining and accessing information. Because the system is operated by a third-party vendor, department staff are not able to perform routine maintenance and enhancements to the system.

Compatibility with existing systems. The vendor's hardware and software infrastructure is not able to communicate with the Department's primary databases or the electronic image system of WRS participant records which are on DOA InfoTech's mainframe computer. The vendor's proprietary hardware and software do not conform to DOA standards.

Electronic transmission of data. Electronic transmission of data from state and local employer payroll systems and enrollment information is desired in the future to eliminate the need for most of the manual data entry. The current vendor is not equipped to handle various data transmission protocols and the anticipated volumes involved with electronic transmission of data.

Final Score and Summary Observations

Each evaluation criteria has been assigned a score between 0 and 100%, with 100% indicating the highest technical score possible. The Technical - Overall score is the average of the scores from the eight evaluation criteria.

Criteria	Score
1. Access	57%
2. Design of Computer Screens	53%
3. Data Integrity	57%
4. Complaint Database Integration	50%
5. Report Development	50%
6. Database Design and Management	43%
7. Compatibility With Existing Systems	20%
8. Electronic Transmission of Data	23%
9. Technical Overall	42%

Cost

One-time systems development costs are amortized over three years. Per user costs are based on 130 users.

One-Time Expenses		
	Total	Per User / Month
Development	\$ 126,800	\$ 27
Ongoing Monthly Expenses		
Operating Expenses	11,400	88
Data Entry	3,375	26
Total Ongoing Expenses	\$ 14,775	\$ 114
Total Cost of Operation		
Total cost per user per month		\$ 141

Summary Observations

The improvements to the health insurance database proposed for this alternative would significantly improve the functionality of the system. However, as a vendor based system, it still would not provide the opportunity for integration with other department systems, or for electronic interfacing with state and local employers.

Option 3. Migrate the database to the Department LAN with improved functionality.

Description

This option would integrate the enrollment, complaint, and employer databases into one centralized database on the Department's LAN. Enhancements would be made to screen design, data integrity edits and management reports.

Assessment Against Criteria

Access. All ETF employees would have access to the system through the existing LAN infrastructure. Employers would not have access to the LAN based system.

Design of the computer screens. The database would be designed to provide a GUI interface using standard terminology. The screen would be designed to facilitate data entry. The GUI interface would make movement within and between screens easier and less time-consuming.

Data integrity. Additional front-end edits and more sophisticated data field edits would facilitate exception reporting and problem resolution. These edits would reduce the effort necessary to correct data and improve the validity of the data.

Complaint database integration. The complaint database would be fully integrated with the enrollment database eliminating duplicative data entry and synchronization concerns.

Report development. Standardized reports would be developed to meet business requirements. State standard reporting tools which would be available on the LAN would allow for complex ad hoc queries. Integration of the employer database would allow development of an automated employer reporting system that would calculate premium payments, reconcile them to employer remittances, and generate invoices.

Database design and management. The database design would use DOA standard software, Oracle, which is currently utilized by the Department, thus eliminating the need for additional application development programmer training. This product makes changes to the database relatively easy. The integration of the enrollment, complaint and employer databases would enhance the productivity of the system by reducing data entry, synchronization problems, and training time.

Compatibility with existing systems. The Department LAN is linked to the DOA InfoTech mainframe where the Department's primary databases and electronic image system resides. The Department uses DOA's standard technology and software, facilitating interaction between systems.

Electronic transmission of data. Electronic transmission of data from state and local employer payroll systems and enrollment information is desired in the future to eliminate the need for most of the manual data entry. The LAN is not equipped to handle various data transmission protocols and the anticipated volumes involved with electronic transmission of data.

Final Score and Summary Observations

Each evaluation criteria has been assigned a score between 0 and 100%, with 100% indicating the highest technical score possible. The Technical - Overall score is the average of the scores from the eight evaluation criteria.

Criteria	Score
1. Access	83%
2. Design of Computer Screens	73%
3. Data Integrity	73%
4. Complaint Database Integration	77%
5. Report Development	70%
6. Database Design and Management	67%
7. Compatibility With Existing Systems	63%
8. Electronic Transmission of Data	47%
9. Technical Overall	68%

Cost

One-time systems development costs are amortized over three years. Per user costs are based on 130 users.

One-Time Expenses		
	Total	Per User / Month
Development	\$ 1,200,000	\$ 256
Ongoing Monthly Expenses		
Operating Expenses	\$ 0	\$ 0
Data Entry	3,375	26
Total Ongoing Expenses	\$ 3,375	\$ 26
Total Cost of Operation		
Total cost per user per month		\$ 282

Summary Observations

The improvements to the health insurance database proposed for this alternative would significantly improve the functionality of the system. As a LAN based system, it would provide opportunities for integration with other department systems, but still would not have the capability for electronic interfacing with state and local employers. LAN based development costs are high compared to other alternatives.

Option 4. Migrate to the Department of Administration's InfoTech mainframe computer with improved functionality.

Description

This option would integrate the enrollment, complaint, and employer databases into one centralized database on DOA InfoTech's mainframe computer. Enhancements would be made to screen design, data integrity edits and management reports.

Assessment Against Criteria

Access. All Department employees will have access to this database on DOA InfoTech's mainframe computer. Employers will have the ability to access the DOA InfoTech mainframe using numerous existing communication protocols. DOA has the ability to expand capacity as required by their business customers.

Design of computer screens. The database would be designed to provide a GUI interface using standard terminology. The screen would be designed to facilitate data entry. The GUI interface would make movement within and between screens easier and less time consuming.

Data Integrity. Additional front-end edits and more sophisticated data field edits would facilitate exception reporting and problem resolution. These edits would reduce the effort necessary to correct data and improve the validity of the data.

Complaint database integration. The complaint database would be fully integrated with the enrollment database, eliminating duplicative data entry and synchronization concerns.

Report development. Standardized reports would be developed to meet business requirements. State standard reporting tools, which would be available on the mainframe, would allow for complex ad hoc queries. Integration of the employer database would allow development of an automated employer reporting system that would calculate premium payments, reconcile them to employer remittances, and generate invoices. The ability to download information from the mainframe to the Department's LAN will be used to populate data within spreadsheets and documents.

Database design and management. The database design would use DOA standard software, DB2, which is currently in use by the Department, eliminating the need for additional application development programmer training. This product makes changes to the database relatively easy. The integration of the enrollment, complaint and employer databases would enhance the productivity of the system by reducing data entry,

synchronization problems, and training time. DOA InfoTech will be responsible for security, back-up and recovery, and 24 hour by 7 day per week support services.

Compatibility with existing systems. The department's primary databases and the electronic image system reside on DOA Infotech's mainframe. Locating the health database on the same platform will facilitate interaction between the systems.

Electronic transmission of data. Electronic transmission of data from state and local employer payroll systems and enrollment information is desired in the future to eliminate the need for most of the manual data entry. InfoTech has the hardware, software and support services in place to accommodate various data transmission protocols and the anticipated volumes involved with electronic transmission of data.

Final Score and Summary Observations. Each evaluation criterion has been assigned a score between 0 and 100%, with 100% indicating the highest technical score possible. The Technical - Overall score is the average of the scores from the eight evaluation criteria.

Criteria	Score
1. Access	97%
2. Design of Computer Screens	87%
3. Data Integrity	90%
4. Complaint Database Integration	90%
5. Report Development	90%
6. Database Design and Management	90%
7. Compatibility With Existing Systems	93%
8. Electronic Transmission of Data	93%
9. Technical Overall	93%

Cost

One-time systems development costs are amortized over three years. Per user costs are based on 130 users.

One-Time Expenses		
	Total	Per User / Month
Development	\$ 636,400	\$ 136
Ongoing Monthly Expenses		
Operating Expenses	\$ 500	\$ 4
Data Entry	1,688	13
Total Ongoing Expenses	\$ 2,188	\$ 17
Total Cost of Operation		
Total cost per user per month		\$ 153

Summary Observations

This option meets all of the department's objectives for the Health Insurance database. The improvements to the system proposed for this alternative would significantly improve the functionality of the system. As a mainframe based system, it would provide opportunities for seamless integration with other department systems, as well as taking advantage of the numerous protocols Infotech would support for state and local employers to interface electronically with the system.

**Health Insurance Database Location and Functionality Assessment
Performed by the Department of Employee Trust Funds**

Scope: The Department needs to determine the most cost-effective location of the health insurance database and confirm the functional requirements as they relate to business needs.

- Options:**
1. Maintain current location and functionality of the system.
 2. Maintain the current location but improved functionality.
 3. Migrate to the Department LAN with improved functionality.
 4. Migrate to the Department of Administration's InfoTech Mainframe Computer with improved functionality.

Benchmark: 0-5 points for each criterion (2/3 of score)
Cost evaluation (1/3 of score)

Criterion	Benchmark	
Access SCORE: _____	5 points	Low Limited access to key Department users with marginally acceptable response time.
		High • Unlimited access for Department users and employers with acceptable response time.
Design of Computer Screens SCORE: _____	5 points	Low Not designed for data entry. No standard naming convention from screen to screen. Movement between screens is cumbersome and time-consuming. Non-GUI interface.
		High Designed for data entry/data capture. Standard naming convention. Movement between screens is facilitated. GUI Interface.

Attachment 1

Criterion	Benchmark	
<p>Data Integrity</p> <p>SCORE: _____</p>	<p>10 points</p>	<p>Low</p> <p>Minimal number of edits and audits at a very high level.</p>
		<p>High</p> <p>Sophisticated front-end edits and audits on data fields.</p>
<p>Complaint Database Integration</p> <p>SCORE: _____</p>	<p>5 points</p>	<p>Low</p> <p>Complaint database is not linked but on-line access to other health insurance screens is available. Duplicate data entry of information.</p>
		<p>High</p> <p>Complaint database is completely redesigned to determine the best way to collect and report information on health insurance plan complaints. Data in entered once and shared.</p>
<p>Report Development</p> <p>SCORE: _____</p>	<p>5 points</p>	<p>Low</p> <p>Standard reports do not meet user needs and are cumbersome to produce.</p>
		<p>High</p> <p>Standard and ad hoc reports are relatively easy to use and create for: Health insurance and complaint data; automated employer reporting including calculation, reconciliation, and generation of invoices.</p>

Criterion	Benchmark	
<p>Database Design and Management</p> <p>SCORE: _____</p>	<p>10 points</p>	<p>Low</p> <p>Lack of integrated databases makes queries and modifications time-consuming .</p>
		<p>High</p> <p>Integrated relational databases. Ability to use standard query tools. Easy to add, change, delete data fields.</p>
<p>Compatibility With Existing Systems</p> <p>SCORE: _____</p>	<p>10 points</p>	<p>Low</p> <p>Complaint database is not linked to the membership/enrollment database.</p>
		<p>High</p> <p>Complaint database is integrated with the health insurance and employer database.</p>
<p>Electronic Transmission of Data</p> <p>SCORE: _____</p>	<p>10 points</p>	<p>Low</p> <p>Does not communicate easily to key department systems (WEBS, Image, employer database, etc.). Non-standard software.</p>
		<p>High</p> <p>Can cost-effectively and efficiently communicate with key department and employer systems.</p>

Background and Database Description

Background

The Group Insurance Board (GIB), supported by the Department, is responsible for providing comprehensive health care coverage at the lowest reasonable cost for all eligible state and local employees, annuitants, and certain former employees. The GIB currently self-funds several standard fee-for-service plans and contracts with twenty four alternate plans (health maintenance organizations [HMOs] and preferred provider plans [PPOs]) to provide health care coverage. More than 210,000 individuals are covered statewide with projected 1998 premiums of approximately \$400 million. Premiums for active employees are paid predominantly by employers. Retirees and former employees pay 100% of the premiums.

During the mid 1980s, the GIB was able to achieve its mission through use of a competitive managed care system. However, when health care costs rose at the double-digit inflation rate in the late 1980s, the GIB began to consider possible changes to the program and as part of that effort, contracted with the Martin E. Segal Company to review the program. The report from Segal offered several suggestions but stressed the importance of an information system to track enrollment and cost trends.

The Department subsequently secured funding in the 1992 budget adjustment act to fund health insurance data collection and analysis and received on-going funding in subsequent biennial budgets. In 1996, the Legislative Audit Bureau reviewed the health program and concluded that since 1993 the state has saved as much as \$6.7 million in direct premium costs due to the negotiation process which relies upon information contained in the health insurance database. The Department believes this is a conservative estimate of cost savings because it does not factor in any savings due to the sentinel effect of having a proven system of critically examining all premium proposals. Health care service utilization information enables the Department to actuarially analyze the plans' premium quotes. Therefore, the Department is in a better position to negotiate premiums that are more closely approximate each plan's demographics and loss experience ratios.

Description of health insurance database

The health insurance database consolidates enrollment data about all subscribers and their dependents covered by the GIB approved plans into a single system. The health insurance database is operated on a proprietary system owned by the contract administrator, Grant Thornton LLP. The administrator maintains the overall functioning of the database and charges the Department to access the data. The database maintenance and access charges reflect the computer usage, storage, access and printing charges associated with the data input, processing and output. This charge also includes the development and production of pre-determined reports. Technical assistance charges are

incurred when assistance is required for database enhancements needed for the preparation of special reports or to increase the system's functionality.

Data in the system is constantly being updated and permits the preparation of thirty six monthly status, trend and error-control and -correction reports. The Department continues to need access to the data for analysis and ad-hoc reports. The random sample for the annual employee satisfaction survey is also from this database.

The system contains hundreds of individual data elements, including but not limited to:

- Subscriber and dependent identification information.
- Demographic information for subscribers and dependents.
- Employer data for each subscriber.
- Coverage information for subscribers and dependents.
- Data on "other coverage."
- Source of premium payments.
- Data on complaints from subscribers about their health plans.
- File update information.

The administrator performs numerous validity checks of the data elements. Standard edits also ensure that essential information is maintained in a valid and reliable format.

The health insurance database provides the GIB's actuary with extensive demographic information. The availability of the database information allows the actuary to examine sex/age composition of plan enrollment. The actuary uses this information to analyze claims data and establish "cost targets" for use in the annual negotiation of premium rates with HMO and PPO plans.

Attachment 4

Option 3 Cost: The steps and estimated time necessary to redesign the software system are as follows:

- Analysis. A team of two IT personnel would spend approximately five months (200 staff days) meeting with users, reviewing and defining requirements. The output from this effort would be an external design document showing the data store, screens, reports, etc. that will enable ETF to manage health insurance data.

An additional 100 days of effort would be required for analyzing the client/server implications of the design (object-oriented, event-driven actions).

- Internal Design. A team of three IT personnel would spend approximately two months (120 staff days) doing the detail work of planning for the files and DB2 tables, pseudo-coding the programs for batch extracts, batch update processors, menu screens, inquiry screens, update screens, etc. to support the management of the health insurance data.

An additional 120 days of effort would be required for designing the technological considerations to implement the object-oriented, event-driven system.

- Integration into existing WEBS database. A team of three IT personnel would spend approximately two months (120 staff days) laying the groundwork to integrate the new system into the existing WEBS system.

An additional 120 days of effort would be required for designing and implementing the technology to have local data interface with host data in a seamless manner.

- Construction. A team of three IT personnel would spend approximately four months (240 staff days) developing code and conducting unit testing and system testing.

An additional 240 days of effort would be required for developing the requirements with additional software (PC front end software, object-oriented programming, additional testing of the integrated components, etc.).

- User acceptance testing and performance tuning. A team of three IT personnel would spend approximately two months (120 staff days) supporting user acceptance testing.

An additional 120 days of effort would be required for setting up the various components and debugging complex technological problems.

- Implementation. A team of three IT personnel would spend approximately one month (60 staff days) converting the data and implementing the new tables, files, screens, reports and other processors.

Attachment 4

An additional 60 days of effort would be required for installation of the additional local components.

- Technology considerations. The client/server technology base requires additional effort to ensure a secure and reliably performing system.

- a. Local Database. There would be 60 days of effort getting an Oracle database sized and set up as well as communicating with the existing infrastructure.
- b. Network. There would be 60 days of effort getting the LAN/WAN/host connection established.
- c. Performance tuning. There would be 120 days of effort getting all the separate components (client, LAN, and host software) configured correctly to ensure reasonable performance and response times for the business user.

- Estimated One-time Development Cost.

Total effort would be 1,860 days.

LABOR: 1,860 days @ 8 hrs. @ \$80/hr.....\$1,190,400

Equipment: \$5,000 one-time.....\$ 5,000

Total estimated one-time development cost is \$1.2 million.

OPTION 4: Cost Estimate

The steps and estimated time necessary to redesign the software system are as follows: Analysis. A team of two IT personnel will spend approximately five months (200 staff days) meeting with users, reviewing and defining requirements. The output from this effort will be an external design document showing the data store, screens, reports, etc. that will enable ETF to manage health insurance data.

- Internal Design. A team of three IT personnel will spend approximately two months (120 staff days) doing the detail work of planning for the files and DB2 tables, pseudo-coding the programs for batch extracts, batch update processors, menu screens, inquiry screens, update screens, etc. to support the management of the health insurance data.
- Integration into existing WEBS database. A team of three IT personnel will spend approximately two months (120 staff days) laying the groundwork to integrate the new system into the existing WEBS system.
- Construction. A team of three IT personnel will spend approximately four months (240 staff days) developing code and conducting unit testing and system testing.
- User acceptance testing. A team of three IT personnel will spend approximately two months (120 staff days) supporting user acceptance testing.
- Implementation. A team of three IT personnel will spend approximately one month (60 staff days) converting the data and implementing the new tables, files, screens, reports and other processors.

- One-time Development Cost

Total development effort will be 860 days.

Labor: 860 days @ 8 hrs. @ \$80/hr	\$550,400
InfoTech charges @ \$100/day =	\$ 86,000
Total development cost	\$636,400



State of Wisconsin
Department of Health and Family Services

Tommy G. Thompson, Governor
Joe Leean, Secretary



May 28, 1998

MAY 29 1998

The Honorable Timothy Weeden
Senate Co-Chair, Joint Committee on Finance
1 East Main Street, Room 230
Madison, WI 53702

The Honorable John Gard
Assembly Co-Chair, Joint Committee on Finance
Room 315 North, State Capitol
Madison, WI 53702

Dear Senator Weeden and Representative Gard:

The Department of Health and Family Services requests that the Committee, acting under s.13.101 (13) (b), transfer \$140,200 from the proceeds of land sales at the Mendota Mental Health Institute to the Department. This amount represents half of the proceeds from the sale that occurred in July 1997.

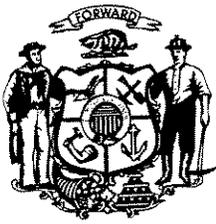
The Department proposes to use the funding to reduce the deficit at the Mental Health Institutes (MHIs) in appropriation s.20.435 (2) (gk) [229]. At s.13.10 sessions in December 1996 and March 1997, the Committee approved requests by the Department to use proceeds from earlier sales of land at the MHIs for deficit reduction. We continue to believe that this is the best use for these funds at the current time.

Tom Alt, Administrator for the Division of Care and Treatment Facilities, will represent the Department for this request. Thank you for your consideration of this request.

Sincerely,

A handwritten signature in cursive script, appearing to read 'Joe Leean'.

Joe Leean
Secretary



TOMMY G. THOMPSON

**Governor
State of Wisconsin**

May 29, 1998

The Honorable Timothy Weeden
Senate Chair, Joint Committee on Finance
203 East, State Capitol
Madison, Wisconsin 53702

JUN 01 1998

The Honorable John Gard
Assembly Chair, Joint Committee on Finance
315 North, State Capitol
Madison, Wisconsin 53702

Dear Senator Weeden and Representative Gard:

Pursuant to s. 119.80(2)(am), Wisconsin Statutes, I am submitting to the Joint Committee on Finance the following proposal for the expenditure of funds in fiscal year 1998-99 from the appropriation under s. 20.255(2)(ec), Wisconsin Statutes, Aid to Milwaukee public schools.

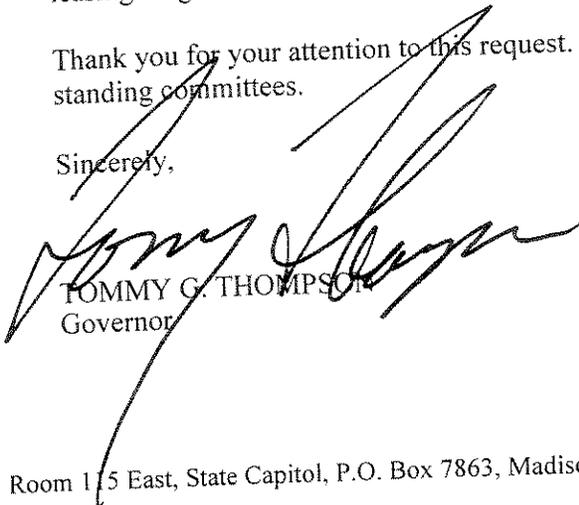
Program	<u>Proposed Funding</u>
All day kindergarten (High Scope Curriculum)	\$5,090,000
First grade (High Scope Curriculum)	\$1,070,000
Day care kindergarten programs	\$ 910,000
Extended day programs	\$ 430,000
Alternative education programs (Learnfare)	\$ 500,000
Total	<u>\$8,000,000</u>

The proposed allocation of funds is identical to the allocation approved by the Committee in the previous five fiscal years.

While I am approving this plan for 1998-99, I will review the use of this appropriation as part of my 1999-01 biennial budget deliberations to determine if other uses of some or all of these funds may better improve student achievement and address other significant MPS needs. Other potential uses of these funds could include summer school or after school programs, building or leasing neighborhood schools, or reducing class size in the elementary grades.

Thank you for your attention to this request. Separate letters have been sent to the appropriate standing committees.

Sincerely,


TOMMY G. THOMPSON
Governor





JUN 02 1998

May 29, 1998

The Honorable Timothy Weeden *Tim*
Co-Chair
Joint Committee on Finance
Room 203
1 East Main Street
Madison, WI 53702

The Honorable John Gard *John!*
Co-Chair
Joint Committee on Finance
Room 315 North
State Capitol
Madison, WI 53702

SUBJECT: 13.10 REQUEST FOR A PROJECT POSITION FOR THE DAIRY 2020 PROGRAM

Dear Co-Chairs:

The Department of Commerce requests authorization for 1.0 FTE Grants Specialist-Advanced project position for the Dairy 2020 program. The Department requests a one-year position, with authorization to request three one-year extensions if the need for the position continues. Funding for the position will be obtained from the supplies and services appropriation for the Dairy 2020 program, which is part of the Department's 101 GPR appropriation. The Department of Commerce has a supplies and services budget of \$106,400 for the Dairy 2020 program. The annual cost of the project position is \$45,670. This will result in a balance of \$60,730 for supplies and services for the program. The position would be for the timeframe of September 14, 1998 through September 13, 1999.

Background

1997 Wisconsin Act 27 created a dairy grant program under the Department's Rural Economic Development (RED) program. The Department was authorized to spend up to \$200,000 of the RED appropriation for early planning grants to dairy or agricultural businesses. In addition, the Department may spend up to 50 percent of the remaining RED appropriation for these types of grants and for micro-loans to dairy and agricultural businesses. Early planning grants can be made to individuals for activities such as developing a feasibility study, a business plan, financial projections, or management assistance. The budget adjustment bill increased the RED appropriation by \$250,000 per year and authorized the Department to utilize up to \$500,000 per year for dairy grants, and up to 50 percent of the remaining funds for the dairy grants and loans.

During the 1995-97 biennium, the Department received only 10 Dairy 2020 projects and 47 normal RED applications. The demand for funds under the dairy program so far this biennium has increased significantly. Since July 1, 1997, the Department has received 150 applications for funding under the Dairy program. As of May 8, 1998, a total of \$357,000 has been awarded to 120 applicants. There are currently 30 applications in-house that are waiting to be reviewed. If this volume of application continues throughout the rest of the biennium, it is likely that we will receive a total of 360 applications during the biennium.

The Department currently has one FTE GPR Economic Development Consultant that was authorized for the Dairy 2020 initiative. This person's responsibilities are broken down as follows:

- 20 percent Developing and managing the Dairy 2020 Initiative in cooperation with the Initiative partners and other Department staff.
- 30 percent Providing technical assistance in the retention and expansion of dairy and other agricultural businesses including farms and processing facilities.
- 20 percent Providing assistance to communities and local organizations in attracting, creating and retaining job opportunities related to dairy businesses, and as appropriate, other agricultural businesses.
- 15 percent Evaluating, analyzing, and preparing dairy industry-related policies and programs.
- 15 percent Promoting the Wisconsin dairy business climate and programs designed to assist the dairy industry.

A detailed position description for this position is attached. The Economic Development Consultant does not have the time to process the large volume of applications the Department receives for this program in an effective and timely manner.

The Dairy 2020 program is located in the Bureau of Business Finance (BBF). In addition to the Dairy 2020 Consultant, the Bureau has 7.5 professional staff and a Bureau Director. Of these positions, 6 are funded by GPR and 1.5 are funded by federal Community Development Block Grant funds. These staff are responsible for administering the following programs: Major Economic Development, Customized Labor Training, Technology Development Fund, Employee Ownership, Export Development, Community Development Block Grant-Economic Development, Lake States Wood Utilization, and the Rural Economic Development programs. The 1997-99 biennial appropriations for these programs total approximately \$43 million. The staff are responsible for administering a portfolio of 575 projects totaling almost \$132 million in active loans and grants.

Staff are experiencing difficulty effectively managing this portfolio due primarily to the increased volume of workload associated with the Dairy 2020 program. In addition, Commerce is also evaluating ways in which all of its loan and grant programs can better meet the needs of the agricultural community. Because of this, it is expected that demand will increase in all our

other programs for agricultural projects which will further strain staff's ability to provide professional and timely service.

The responsibilities of the Department's loan officers differ significantly from commercial loan officers. Commercial loan officers only monitor a loan to assure payments are made until the loan is repaid. BBF loan officers have to continuously monitor projects to assure the business is meeting the economic development factors, such as job creation and hiring of targeted employees that are contained in the law and in the contract. The BBF loan officers have to monitor grants for three years after the last disbursement of funds is made; and monitor loans, which are typically 7 to 10 years in duration, until they are repaid. Therefore, an award is considered "active" until all the reporting requirements are completed.

The length of time that awards must be monitored means that the volume of workload cannot be judged only on the number of awards that are made. For example, there were 120 awards made under the Wisconsin Development Fund in the 1993-95 biennium. This was a 28 percent increase in the number of awards made in the previous biennium. However, the equivalent workload increase for the 1993-95 biennium was 64 percent because staff still had to service loans made in the two previous biennia.

The responsibilities of the new project position will be:

- 45 percent Acting as an agriculture finance packaging expert.
- 25 percent Monitoring the projects that are funded under the Dairy 2020 program.
- 10 percent Providing advice to the Department on programs and changes that should be made to respond to the needs of the dairy and agricultural industry.
- 10 percent Conducting training on dairy programs and provide staff assistance to the RED Board on dairy and agricultural activities.
- 10 percent Assisting in special projects and performing other duties as assigned.

A detailed job description for the Grants Specialist-Advanced is attached.

Funding Availability

The Department of Commerce will fund the 1.0 FTE project position utilizing the supplies and services authorized for the Dairy 2020 program. The annual costs are as follows:

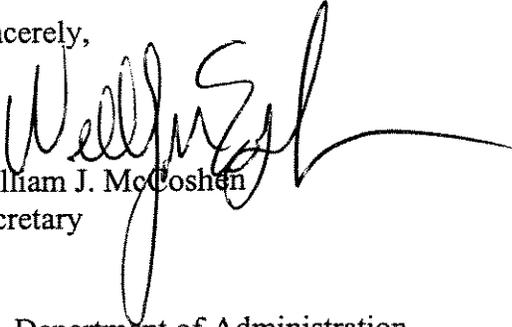
Grants Specialist-Advanced

Wages	\$33,260
Fringes	12,410
TOTAL	\$45,670

These are all the costs that are associated with this project position. It is likely there will be some supplies and services expenses. However, these will be absorbed by the remaining \$60,730 in supplies and services available for the program.

I will be happy to discuss this proposal with you.

Sincerely,

A handwritten signature in black ink, appearing to read 'William J. McCoshen', with a long horizontal flourish extending to the right.

William J. McCoshen
Secretary

cc: Department of Administration
Legislative Fiscal Bureau

Enclosures: Position descriptions for Grants Specialist-Advanced and
Economic Development Consultant



POSITION DESCRIPTION

DER-DCC-10 (5-84)
 State of Wisconsin
 Department of Employment Relations

1. Position No.	2. Cert/Reclass Request No.	3. Agency No.
	98-68	143

4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Department of Commerce Division of Economic Development Bureau of Development Finance 201 West Washington Avenue Madison, WI 53702
6. CLASSIFICATION TITLE OF POSITION Grants Specialist-Advanced-Project	
7. CLASS TITLE OPTION (To be Filled Out By Personnel Office)	8. NAME AND CLASS OF FORMER INCUMBENT NEW POSITION
9. AGENCY WORKING TITLE OF POSITION	10. NAME AND CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR Todd Kearney, Director Administrative Officer 2-Supervisor	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?

3. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? AND ATTACH A SUPERVISORY POSITION ANALYSIS FORM (DER-PERS-84). Yes No IF YES, COMPLETE

4. POSITION SUMMARY - PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

 SEE ATTACHED

5. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION (Please see sample format and instructions on back of last page.)
 -GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
 -WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
 -TIME %: Include for goals and major worker activities.

TIME %	GOALS AND WORKER ACTIVITIES
	SEE ATTACHED

(Continue on attached sheets)

SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION (See Instructions on Back of last page)
 a. The supervision, direction, and review given to the work of this position is [] close [] limited [] general.
 b. The statements and time estimates above and on attachments accurately describe the work assigned to the position. (Please initial and date attachments.)

 Signature of first-line supervisor _____ Date _____

EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION
 I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position. (Please initial and date attachments.)

 Signature of employee _____ Date _____
 Signature of Personnel Manager Judy Arzy Date 5-13-98

14. POSITION SUMMARY

This position is a statewide agricultural economic development specialist based in Madison with some travel and represents the Department in the implementation of economic development programs that assist Wisconsin's diverse agricultural economy. The specialist serves as a bureau expert in reviewing applications for financial assistance, negotiating modifications to contract terms and authorizing the disbursement of funds for projects assigned by the Director of the Bureau of Business Finance. The position is responsible for being a resource person on more general agricultural economic development issues including program design and implementation, performing specific project monitoring, evaluating program operational procedures, and planning and conducting various Department training programs.

15. GOALS AND WORKER ACTIVITIES OF THIS POSITION

TIME % GOALS AND WORKER ACTIVITIES

- 45% A. Provision of specialized assistance to local government officials and business persons in planning, developing, negotiating, and implementing agricultural economic development programs that utilize the Bureau's resources, other federal and state economic development programs, bank financing and other private sources or equity contributions. The specialist's role is that of an agriculture finance packaging expert who maintains rapport and works closely with the financial network that funds agricultural development proposals.
- A1. Provide specialized technical assistance to local government officials and business persons in packaging agriculture related economic development proposals.
 - A2. Inform financial institutions of their role in economic development projects and work with them to structure specific proposals.
 - A3. As a resource person for bureau staff, provide an in-depth financial analysis of proposals received for funding. This may include an analysis of both historical and projected financial statements as well as personal financial statements. The position will utilize the Department's computerized financial analysis software and will present a written narrative of the applicants financial condition.
 - A4. Independently review assigned economic development applications for completeness and suitability for funding. Determine that there is a need for public financial assistance and that the project meets the minimum eligibility requirements.

- A5. Utilizing the Bureau's standard underwriting criteria, independently evaluate proposals and recommend funding actions. Such evaluations will include a recommendation concerning the appropriate funding level, the specific use of Department funds and if a loan, the specific rate and term of the loan, the collateral requirements, supporting guarantees and other terms and conditions necessary to adequately safeguard the Department's investment.
 - A6. Negotiate terms for economic development contracts.
 - A7. Provide follow-up services to businesses and local governments whose proposals were not funded. Explain the reasons for non-funding.
- 25% B. Monitoring of assigned projects, specifically including the provision of on-site technical assistance related to program implementation and compliance.
- B1. Examine recipient performance records and reports to assure compliance with program requirements and objectives.
 - B2. Assist recipients in understanding and complying with program regulations.
 - B3. Prepare contract amendments as necessary to facilitate the implementation of local programs consistent with state project objectives and with the terms of the contract.
 - B4. Serve as a resource person or negotiator to resolve noncompliance problems during the period of the contract.
 - B5. Direct recipients to appropriate sources of technical and/or financial assistance where issues or problems arise that are outside the expertise of the department representative.
 - B6. Report activities and problems at regular intervals to management and make recommendations when appropriate to insure the proper administration of the Bureau's programs.
 - B7. Approve release of funds (drawdowns) according to contract terms.

- B8. Close-out projects in accordance with the contract provisions and Bureau policy.
- 10% C. Program design and implementation.
 - C1. Advise department management on the design and implementation of programs as needed to help maintain its responsiveness to the economic development needs of Wisconsin's agriculture economy.
 - C2. Recommend revisions/modifications in the statutes, rules and guidelines of the programs when needed.
 - C3. Recommend changes/modifications in the design and use of credit evaluation, record keeping and filing system for the programs.
- 10% D. Assist in the Bureau's training programs, develop agendas and materials for appropriate Boards or Councils.
 - D1. Assess economic development training needs through interviews, questionnaires and evaluations.
 - D2. Develop agendas and material for Board or Council meetings.
 - D3. Monitor and evaluate the Bureau's training programs to determine their effectiveness in meeting local needs.
- 5% E. Assistance in special projects as assigned, including exploring initiatives designed to enhance or expand the applicability of bureau-administered programs to agri-businesses.
- 5% F. Other duties as assigned.

POSITION DESCRIPTION

DER-PERS-10 (Rev. 5-84)
State of Wisconsin
Department of Employment Relations

1. Position No. 322550D	2. Cert./Reclass Request No. 98-11	3. Agency No. 143
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4. NAME OF EMPLOYEE John H. Lang	5. DEPARTMENT, UNIT, WORK ADDRESS Department of Commerce Division of Economic Development Bureau of Development Finance 201 W. Washington Avenue Madison, WI 53702
CLASSIFICATION TITLE OF POSITION Economic Development Consultant	
CLASS TITLE OPTION (To be Filled Out By Personnel Office)	8. NAME AND CLASS OF FORMER INCUMBENT John Behling Economic Development Consultant
AGENCY WORKING TITLE OF POSITION	10. NAME AND CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES
NAME AND CLASS OF FIRST-LINE SUPERVISOR Todd Kearney Administrative Officer 2-Supvr.	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?

DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? AND ATTACH A SUPERVISORY POSITION ANALYSIS FORM (DER-PERS-84). Yes No IF YES, COMPLETE

POSITION SUMMARY - PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

SEE ATTACHED

DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION (Please see sample format and instructions on back of last page.)
-GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
-WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
-TIME %: Include for goals and major worker activities.

TIME %	GOALS AND WORKER ACTIVITIES
	SEE ATTACHED

(Continue on attached sheets)

SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION (See Instructions on Back of last page)

The supervision, direction, and review given to the work of this position is close limited general.

The statements and time estimates above and on attachments accurately describe the work assigned to the position. (Please initial and date attachments.)

Signature of first-line supervisor: *[Signature]* Date: 12/23/97

EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position. (Please initial and date attachments.)

Signature of employee: *[Signature]* Date: 01/07/98

Signature of Personnel Manager: *[Signature]* Date: 10/21/97

14. POSITION SUMMARY

The individual in this position will perform highly responsible professional work involving a wide array of activities designed to promote the economic growth of Wisconsin's dairy industry. This position will provide consultation, advice and assistance to chief executives and top management of businesses as well as department supervisors, the Governor, legislators, and local economic and community development leaders. This position will encourage agricultural-related businesses to expand or develop new facilities in the state and assist local officials and groups in helping these types of firms expand or locate in their communities and in promoting their communities to interested firms. This position will develop and manage the Dairy 2020 Initiative. The objective of the initiative is to develop specific implementable actions to improve dairy farm profitability and dairy industry competitiveness. The Dairy 2020 Initiative is a way for the industry to unite to make Wisconsin the best place to produce and market milk and dairy products. Dairy 2020 is a comprehensive, economic development endeavor that involves milk producers, processors, state agencies and the University of Wisconsin.

15. GOALS AND WORKER ACTIVITIES OF THIS POSITION

TIME % GOALS AND WORKER ACTIVITIES

- 20%
- A. Development and management of the Dairy 2020 Initiative in cooperation with the Initiative partners and other Department staff.
 - A1. Develop and oversee the implementation of goals and an annual workplan for the Dairy 2020 Council and the Initiative.
 - A2. Monitor, encourage, and advocate progress toward the Initiative's goals.
 - A3. Coordinate the efforts of Initiative partners and participants.
 - A4. Represent the Initiative and the Department to Initiative partners and others.
 - A5. Serve as the bureau's principal advisor and consultant on the dairy industry and other agricultural businesses.

- A6. Assist in the preparation of an annual budget and biennial budget requests related to the Dairy 2020 Initiative.
- A7. Staff the Dairy 2020 Council.
- A8. Establish and maintain effective working relationships with other organizations in the state and country that are concerned with the dairy industry.
- A9. Produce the Dairy 2020 newsletter and reports and communicate regularly in other ways with the Initiative partners, the press, the dairy industry, and others about Dairy 2020 and other agricultural economic development issues.
- A10. Evaluate the effectiveness of the program and implement actions to increase effectiveness.
- A11. Brief the Bureau Director, Division Administrator, and Secretary on program issues and concerns.

30%

- E Retention and expansion of dairy and other agricultural businesses including farms and processing facilities.
 - B1. Contact executives and facility siting officials in Wisconsin companies to facilitate their expansion in-state.
 - B2. Identify, target and initiate calls on existing businesses that are likely prospects for expansion.
 - B3. Prepare and provide specific information on sources of business financing. Provide business consulting services to assist businesses in preparing business plans and loan packages.
 - B4. Provide technical support to Area Development Managers in arranging and conducting community and site location visits and meetings with appropriate local government and private officials.
 - B5. Maintain contact and follow up with active prospects until location or expansion decisions are made.
 - B6. Identify and initiate calls on businesses in need of assistance and advise and assist them in accessing the programs available to them.

B7. Promote and market the economic development programs available from the local, state and federal governments as well as those available from other sources.

20% C. Assistance to communities and local organizations in attracting, creating and retaining job opportunities related to dairy businesses, and as appropriate, other agricultural businesses.

C1. Consult and advise on the process and procedures to develop an effective local economic development program related to agricultural and dairy businesses.

C2. Consult and advise local governments and development organizations on the establishment of business retention call programs and assist in those calls.

C3. Advise local communities about, and assist them in marketing and promoting, those economic development tools that are available to them from state and federal governments and other sources.

C4. Provide technical assistance to communities in gathering and presenting the data needed by agricultural and dairy businesses seeking to locate there.

C5. Provide specific information on state and federal programs available to localities for business retention and expansion.

C6. Provide technical assistance to local communities in making presentations to potential prospects.

C7. Plan, coordinate and implement workshops, seminars and conferences to provide development organizations, local governments and business executives with current, detailed information about Dairy 2020.

15% D. Evaluation, analysis and preparation of dairy industry-related policies and programs.

D1. Collect, analyze and evaluate information about new trends and initiatives affecting the dairy industry.

D2. Research revitalization issues in current publications and other written resources.

- D3. Recommend new initiatives related to dairy industry revitalization to the department and the council.
 - D4. Advise and prepare policy recommendations for the Bureau Director, the Division Administrator, and the Secretary regarding needed legislative and policy changes.
 - D5. Recommend strategies for adoption of policy recommendations and advance those strategies within the Dairy 2020 Initiative, the dairy industry, and the legislature.
- 15%
- E. Promotion of the Wisconsin dairy business climate and programs designed to assist the dairy industry.
 - E1. Direct the development of promotional materials.
 - E2. Develop cooperative promotional and educational ventures with public and private-sector partners.
 - E3. Coordinate publicity and outreach with the Bureau of Information Services, the Dairy 2020 Council, and others.
 - E4. Present informational speeches to individuals, groups, and communities interested in dairy industry revitalization.
 - E5. Advise other public and private consultants to facilitate promoting and marketing the current available economic development programs available from state, local, federal, as well as private sources.