AGENDA

1) BIS Update – Patti Balacek | Angie Martin

2) Achieve the Dream Update – Tracy Dryden | Mary Anna Thornton

3) Policy Revisions – Amy Thornton
   A) C0700 Leave of Absence

4) Policy Subcommittee Update – Amy Thornton
BIS Growth Plan

Business & Industry Services Division (BIS) at Western Technical College is committed to providing solutions to meet your needs as you strive to improve employee productivity, quality, and satisfaction.

Prepared by

Patti Balacek
Dean of Workforce and Economic Development

&

Angie Martin
Product Development & Sales Coordinator (BIS Manager)

Updated on: Monday, September 12, 2016
Executive Summary

Over the last 9 years, BIS has undergone significant changes both in philosophy and structure. These changes include:

- Moving from a reactive organization to a proactive one with a focus on reaching out to our business community and educating them on all Western and BIS has to offer.
- Structuring the internal staffing to support a sales focused format with a sales leader, product development coordinator and fulfillment staff which take all contract sales from cold call to fulfilled contract with an emphasis on customer service.
- Combining Continuing Education and Professional Development seminars into BIS and, after extensive research, reformatting the PD seminars into a ticket based selling model with a headliner event showcasing the Lunda Center.
- Expanding the product lines in BIS to include services like needs assessment, strategic planning, marketing and business plan writing, assessments (testing) and operational excellence (lean).

All of the changes have led to a significant increase in revenue through BIS growing from $692,000 in FY06 (which included Drivers Ed contracts) to over $1.7 million (with no Drivers Ed), but have also led to staffing changes as the required skill sets changed and expanded. Each staff change leads to a dip in revenue and requires up to a 1 year period of acclimation and learning.

During a strategic planning session, the BIS team conducted a SWOT analysis and planning exercise following the Vision/Traction organizer. This simple tool provides for both far reaching goals, 10 years and 3 years as well as focused 1 year goals which break down into quarterly ‘rocks’ or action items. The SWOT analysis helped focus the team on which items were in our control, which ones were already strong, and which ones needed work (Appendix A). This included determining the Key Performance Indicators (KPI’s) for the unit which will help us stay on track and will, with additional metrics, form our dashboard. The Key Performance Indicators described and seen below also align with the college indicators and are shown in more detail in Appendix B.

Key Performance Indicators Descriptions:

- **BIS Sold Rev**: Includes all revenue for consultant sold contracts including contract match on WAT grants which contributes to making the division being self-sustaining. While BIS staff do the work of WAT grants, prisons and others, no money goes to cover staff costs.
- **Net Surplus**: Bottom line subsidy from the college to BIS.
- **FTEs**: Only those generated from BIS sold offerings. Does not include Prisons, HS’s etc.
- **Headcount**: Only those generated from BIS sold offerings. Does not include Prisons, HS etc.

<table>
<thead>
<tr>
<th>Key Performance Indicators</th>
<th>Current State</th>
<th>1 Year Goal</th>
<th>2 Year Goal</th>
<th>3 Year Goal *</th>
<th>10 Year Goal *</th>
<th>College Key Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIS Sold Rev</td>
<td>$322,407</td>
<td>$400,000</td>
<td>$600,000</td>
<td>$900,000</td>
<td>$3 Million</td>
<td>Cost per Credit Hr&amp; Satisfaction</td>
</tr>
<tr>
<td>Net Surplus (after all admin)</td>
<td>($290,000)</td>
<td>($100,000)</td>
<td>($70,000)</td>
<td>Even</td>
<td>$100,000</td>
<td>Cost per Credit Hr</td>
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<tr>
<td>FTEs</td>
<td>29.11</td>
<td>35</td>
<td>45</td>
<td>70</td>
<td>180</td>
<td>Students Served</td>
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<tr>
<td>Headcount</td>
<td>2292</td>
<td>2700</td>
<td>4500</td>
<td>6000</td>
<td>16000</td>
<td>Students Served &amp; Satisfaction</td>
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</table>
## CORE VALUES

<table>
<thead>
<tr>
<th>Value</th>
<th>Core Value</th>
</tr>
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<tbody>
<tr>
<td>Learning</td>
<td>Excellence</td>
</tr>
<tr>
<td>Accountability</td>
<td>Student Success</td>
</tr>
<tr>
<td>Teamwork</td>
<td>Integrity</td>
</tr>
<tr>
<td>Diversity</td>
<td>Respect</td>
</tr>
</tbody>
</table>

## CORE FOCUS™

**Purpose/Cause/Passion:** To help organizations of all types improve their workforce and business productivity, quality and satisfaction while becoming an innovative and forward-thinking profit center for Western Technical College.

**Our Niche:** customized training, business solutions and professional development

## 10-YEAR TARGET™

**Target Market:** Business in the Western Technical College district with 100 – 500 employees (contract). Twenty-five to fifty year old working adults looking for professional development opportunities (PD).

**Three Uniques:**
1. Training programs developed specifically for your business.
2. Access to a broad scope of subject areas.
3. Western brand recognized and valued throughout the market we serve.

**Process:** Print, Digital, and Event Based Marketing Strategy.

## 3-YEAR PICTURE™

**Future Date:** 6/30/19

**Revenue:** $900,000

**Profit:** $Net zero

**Measurables:** FTEs: 70; Headcount: 6000

**What does it look like?**
- 1 to 3 new products implemented annually
- 1 new business initiative every 2 to 3 years
- CRM utilized fully for sales forecasting and customer communication even outside BIS.
- Marketing Plan implemented, updated and streamlined
- Sales Manager running a vibrant sales team
- PD expanded and achieving cost recovery
- Strong planning process in place and monitored.
- Key role in college decision making.
- Seen as an innovative, entrepreneurial, problem solving unit.
### 1-YEAR PLAN

**Future Date:** 6/30/17  
**Revenue:** $ 400,000 (sold + company match)  
**Net Surplus:** - $ 100,000  
**Measurables:** FTE = 35; Headcount = 2700;

#### Goals for the Year:

1. Implement the new staffing model & process flow.
2. Working CRM being utilized as a sales tool on a daily basis by all appropriate staff.
3. Clear Dashboard for KPI’s and all metrics updated monthly.
4. Create and implement a marketing plan for both contract training and professional development.
5. Develop sales metrics and strategy for the sales team.
6. Develop a system to improve internal communication.
7. Develop 1 to 3 new products annually.

### ROCKS (quarterly actions)

**Future Date:** 9/30/16  
**Revenue:** $125,000  
**Net Surplus:** Unclear with vacant positions  
**Measurables:** FTE/Hdct (lagging indicators for 1 Qtr)

#### Rocks for the Quarter:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hire the Data Specialist. Implement new duties for each position</td>
<td>PB/AM</td>
</tr>
<tr>
<td>2</td>
<td>Choose CRM, install and clean up data</td>
<td>AM</td>
</tr>
<tr>
<td>3</td>
<td>Establish the baseline for all metrics and timeline to review</td>
<td>PB/KG</td>
</tr>
<tr>
<td>4</td>
<td>Develop marketing plan with measurable timelines</td>
<td>AM/KA</td>
</tr>
<tr>
<td>5</td>
<td>Hire the sales lead and define sales dashboards with the sales team.</td>
<td>PB/KG/SM</td>
</tr>
<tr>
<td>6</td>
<td>Analyze methods for sharing information/investigate SCRUM</td>
<td>NP</td>
</tr>
<tr>
<td>7</td>
<td>Determine strongest profit centers keeping in mind instructor availability/capacity</td>
<td>KA/AM</td>
</tr>
</tbody>
</table>

### ISSUES (Future work) LIST

1. Instructor quality: Professional Dev./onboarding / inservice / overuse causing business burnout
2. Contracts that are ‘noise’. Have to run through BIS but receive no indirect and/or are cash losses.
3. Improve evaluation forms for students.
4. Trane credit classes will end.
5. Sales strategy for credit classes.
6. Improve relationships with RLC’s.
7. Working with internal resources for marketing planning/timeline.
9. 
10. 

With your cursor in the last row, press Tab to add another row.
Goals for Year 1

Staffing Model

BIS currently has the following positions:

- Dean of Workforce and Economic Development: oversees BIS along with other duties
- Product Development and Sales Coordinator: oversees contract fulfillment, creates all cost-outs and proposals for contracts, oversees product lines
- Sales Lead (hiring currently): primary sales person for BIS.
- Performance Consultant (sales): sales of contracts along with some training.
- Performance Consultant (training): Primary lean trainer with some sales.
- Inside Sales Assistant: Schedules all continuing education, professionals development, headliner event, handles all marketing fulfillment
- Administrative Assistant – Fulfillment: handles all contract fulfillment
- Data Assistant – handles all financials for BIS, serves as accountant for the Sustainability Institute, handles contract record keeping in Powercampus and other systems.

The staff in BIS work very hard, but with the Dean being pulled into other initiatives and unable to handle day to day management, it is time to look at how it is structured, what skills sets exist and how duties and positions might best be organized to provide effective customer service and a viable ‘business’ within a college.

Recommendation:

The Dean of Workforce and Economic Development position is charged with a number of items which are outside the prevue of BIS. This has fostered a sense of disconnection from staff members who are in the office every day. To solve this and to better align the work within the division, the following changes are proposed:

1) The Dean will continue to work on the other, numerous external projects as well as oversee BIS from a leadership perspective. She will continue to supervise the sales positions directly until the open sales lead position is filled and has demonstrated a capacity for both sales and sales management (3 year timeframe). The Dean will no longer be responsible for the day to day operations of the division.

2) The current Product Development and Sales Coordinator will move to the title of BIS Manager focused on operations and marketing with responsibility for day to day management of the entire division. She will monitor all Key Performance Indicators, and metrics as well as having a ‘dotted line’ relationship with the sales people on their goals.

3) The administrative assistant positions in BIS have been specialized by strengths, interests and process.

A new organizational chart and all proposed job descriptions are in Appendix C.
Customer Relationship Management System

The effective management of customer relationships is a critical component in Western Technical College’s BIS sales growth strategy. The flow of information through the contract training unit incorporates multiple customer touch points throughout the sales and fulfillment process. Some of these steps include: initial sales contact, needs analysis, SME meeting and discovery, proposal/contract delivery, contract signature, scheduling and fulfillment, and course follow-up.

Current State: The BIS team currently utilizes a decentralized system for tracking each step in the processes. This decentralization:

- Increases the number of check-ins needed throughout the sales process
- Requires the management of multiple spreadsheets by various staff members
- Contributes to delays in responding to customer requests
- Makes the oversight of the sales process a difficult and time consuming task.

BIS staff currently have Goldmine CRM software loaded on computers. The original implementation of this product took place over 10 years ago and was established to maintain academic data in the business division. In its current format, Goldmine is not a useful CRM in a sales driven enterprise.

BIS pays $966.83 annually for a maintenance renewal contract to HEAT Software for Goldmine. The maintenance payment provides us with software updates and technical support, but provides no training or assistance with implementation, system redesign, or custom reports.

Future State: The use of a CRM will help the BIS team manage customer relationships better by providing one central location for the gathering and storing of information. The CRM system will house data that can be turned into information necessary to generate sales through better management of internal activities.

The primary functions of the CRM will be:

1. Lead Management
2. Sales Pipeline Management
3. List/Master Data Management
4. Sales Activity Tracking
5. Central Reference Point for all Customer Communication
6. Analytics to include customer activity and account management activity

Recommendation:

It is recommended that Western BIS utilize Salesforce as the CRM for our business operations. Salesforce is an all-in-on, cloud-based solution that has everything needed in a CRM. One third of CRM users nationally use Salesforce which makes training and add-on products readily available.

Benefits to Western BIS in selecting Salesforce:

- As a higher education institution, Western is eligible for 10 Salesforce Enterprise Edition licenses at no cost.
• Training is readily available at affordable rates through Salesforce University online.
• Kirkwood Community College has shared a best practices manual for using Salesforce in a contract training program.
• Salesforce offers a user friendly and customizable mobile platform.

### Key Performance Indicators Dashboard

Through a recent planning session, the BIS team determined the Key Performance Indicators for the unit. These indicators, explained earlier, were aligned with the college indicators and established for a 1 year, 3 year and 10 year timeframe. The team acknowledges that the 3 year and 10 year goals may change and shift as time passes, but striving for where we want to go is critical.

The next step is to create a KPI Dashboard which is updated monthly by the Data Specialist and is clearly viewable by all BIS staff and other Western leaders if desired. The dashboard itself should be web-based for ease of access and updating.

**Recommendation:**

Create a dashboard showing all four Key Performance Indicators in both numerical and chart format on the BIS Sharepoint site utilizing the data analysis skills of the Data Specialist.

### Marketing Plan

As the product offerings and focus of BIS has grown and changed over the years, the marketing strategy became broad and sales support focused. This approach, while effective in the early years, structurally cannot sustain the growth needed going forward. A lack of customer segmentation data and minimal investments in customer lists have made it difficult to implement a targeted approach to print marketing, which LERN supports as the most effective way to reach customers in the professional development market. The explosion of social media over the last decade has ushered in a new world of marketing opportunities, but the BIS staff lacks the experience and knowledge to effectively navigate this aggressive and changing platform.

**Recommendation:**

A marketing plan (**Appendix D**) will be implemented and updated annually. The key components of the plan include:

- Market Definition
- Competitive Analysis
- Product Strategy
- Promotional Strategy
In FY 17 the marketing plan needs to focus heavily on gathering market segmentation data and metrics that will allow future campaigns to target specific customers with greater accuracy in both print and digital media. Western BIS must position ourselves deeper into the world of digital media focusing and mastering one social media platform (Facebook) and then investigate additional platforms in FY 17 and FY 18. Content marketing will play a key role in keeping information fresh and cutting edge for BIS customers. Investments in training and possibly contracted support will be needed as current staff work to develop digital marketing skills going forward.

Evaluation and measurements will be critical to the success of a marketing program going forward. Timetables will be established with benchmarks to measure the success of implementation for marketing initiatives.

Product development is also a vital consideration in the marketing plan. Investments of time and resources in curriculum updates, instructor bench expansion, and customer surveys and focus groups will drive the expansion of product offerings over the next one to three years.

Sales Metrics and Strategy

Over the years, BIS has become a sales focused organization, and is currently hiring a Sales Lead position. While we have strategically looked at sales indicators like percent of sales by industry, top 20 clients etc, we have not had a set group of metrics which were updated monthly. We also have not then used those metrics in a cohesive, planned sales strategy.

Recommendation:

The sales team, under the Dean’s leadership and after the Sales Lead is hired, will develop the set of sales metrics which will be utilized in the ongoing sales strategy for all product lines. These metrics will be compiled and updated on a monthly basis and analysis will be provided by the Data Specialist.

Internal Communication

One of the key issues in the BIS division is a lack of communication. This is found at multiple levels from the Dean communicating her other, non-BIS responsibilities, to the front-line customer service staff not understanding what is occurring in contract. After some discussion, the team felt a goal focused on researching and developing a system for scheduled, reoccurring information sharing on a weekly basis was required.

Recommendation:

The team will research methods for sharing information on an ongoing basis including the SCRUM methodology recommended by LERN and Kirkwood Community College. The plan will be developed and implemented by the second quarter of FY17.
Product Development

BIS has been working hard to streamline and focus on our key product areas. They are, in basic terms:

1) Customized Instruction: Training services provided to an entity which is attached to a class within the college system.
2) Technical Assistance: Customized services provided to an entity which is not attached to a class and is more strategic in nature (strategic planning, marketing planning, Lean etc).
3) Professional Development: Open enrollment courses sold both as one at a time offerings and a seminar series, which is a series of offerings sold as a package. This includes the offering of a headliner event each year.

It is clear from past review that areas of focus need to include:

- Credit programming: These are not only high revenue contracts, but they generate substantially more FTEs then other offerings.
- Highly Technical Skills (Electro-Mechanical, Welding): These two areas have been and are the strongest growth areas for BIS. They can be charged at a higher rate, are typically longer in length and are highly desired. ISSUE: Instructor capacity is an issue.

While sales have grown dramatically over the last 10 years, the team feels a more strategic growth strategy is required.

Recommendation:

As part of the growth strategy and sales plan, BIS will determine the most profitable offerings, beyond the two listed above, and develop a methodology for growing those sales. This will include a yearly goal of ‘creating’ one new product line and roll-out each year in at least one product area.

Continuing Education Plan

Fiscal year 2017 began a one year suspension of all continuing education classes being offered by BIS. Historically classes such as real estate, insurance, cosmetology, and auctioneering ran at a deficit and embody a shrinking customer base. Online options represent the biggest threat to operating these programs profitably through BIS. Online competition (including Kaplan, 360 Training, CE Wisconsin, Continuing Ed Express, and more) continues to grow bringing even more affordable class options to market. This competition coupled with an aging demographic for face-to-face classes make these product lines recommended for permanent discontinuation.

Recommendation:

Continuing education options can be an excellent way of providing added service to professionals within the district. More importantly, when aligned effectively with current programs, these classes can showcase Western Technical College program options and campus locations to constituents who may not be exposed to the college on a regular basis.

When re-evaluating continuing educations offerings, the three main considerations will be:

1) Does this align with current program offerings for Western Technical College?
2) What options do professionals in Western’s district have in obtaining/maintaining this license or certification in these areas?
3) Can we compete on service and price while maintaining profitability for the offering?
The table below shows some preliminary considerations to be evaluated during the one year suspension period. During the year, BIS staff will work to meet with deans, faculty, and industry experts to gather information on the viability of these offerings. Additionally, the staggered implantation goals will allow BIS time to better segment customers and build our CRM database. This will develop more strategically targeted marketing campaigns to applicable businesses and professionals.

*Please note that the Food Manager certification is being carried over from previous offerings.

<table>
<thead>
<tr>
<th>Program Alignment</th>
<th>Possible Supportive Classes</th>
<th>Possible Certifications</th>
<th>Course Implementation Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culinary</td>
<td>Food Handler</td>
<td>Food Manager</td>
<td>Fall 2016 (continuation)*</td>
</tr>
<tr>
<td>Welding</td>
<td>Stick/MIG/TIG Basics</td>
<td>AWS Welder Prep and Certification Test</td>
<td>Fall 2017</td>
</tr>
<tr>
<td>Construction</td>
<td>TBD</td>
<td>Electrical Exam Prep /Test Solar (TBD)</td>
<td>Fall 2017</td>
</tr>
<tr>
<td>HVAC</td>
<td>TBD</td>
<td>Refrigeration Certification Prep and Exam</td>
<td>Fall 2017</td>
</tr>
<tr>
<td>Human Resources</td>
<td>TBD</td>
<td>Investigate SHRM credit options</td>
<td>Fall 2017/Fall 2018</td>
</tr>
<tr>
<td>Health Science</td>
<td>TBD</td>
<td>TBD</td>
<td>Fall 2018</td>
</tr>
<tr>
<td>IT- Computer</td>
<td>TBD</td>
<td>TBD</td>
<td>Fall 2018/Fall 2019</td>
</tr>
<tr>
<td>Automotive &amp; Diesel</td>
<td>TBD</td>
<td>ASE certifications</td>
<td>Fall 2018/2019</td>
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</table>
Appendix A – SWOT Analysis

Strengths

- Generating Ideas
- Relationship builders
- Problem solvers
- Organizational support (Western)
- Customer Loyalty
- Customer service
- Passion
- LERN Membership
- Western Brand

Weaknesses

- Divisional Support – Lack of knowledge of BIS & what we do
- RLC Relationships
- Instructor Bench
- Dated Curriculum and Offerings
- Budget Planning/Communication
- Staff Development
- Marketing
- Internal Communication (staff)
- Celebrating Success
- Plan based on Strengthsfinders
- Daily Mgmt Support (Patti gone to mtgs)
- Utilization of LERN

Opportunities

- SLT/College Support
- Divisional Information Mtgs
- RLCs
- Product Development
- Staff Development
- Streamlining of workflow
- Growing market segments
- Economy
- College Resources
- Western Brand

Threats

- Online Learning (others)
- State/Federal Regulations
- Space – Rooms
- Capacity – Rooms & Instructors
- Local Competition (SE MN, CVTC, Private firms)
- Program Elimination
- Budget
- Economy
Appendix B – Key Performance Indicator Graphs

Sold Revenue

BIS Sold Revenue Breakdown

<table>
<thead>
<tr>
<th></th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
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<tbody>
<tr>
<td>TOTAL BIS</td>
<td>$917,419</td>
<td>$776,270</td>
<td>$857,028</td>
<td>$928,949</td>
<td>$925,714</td>
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<tr>
<td>WAT GRANT</td>
<td>$214,743</td>
<td>$85,850</td>
<td>$189,057</td>
<td>$163,352</td>
<td>$203,603</td>
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<tr>
<td>PRISONS/MISC/OTHER GRANTS</td>
<td>$177,518</td>
<td>$188,085</td>
<td>$268,510</td>
<td>$346,741</td>
<td>$163,719</td>
</tr>
<tr>
<td>TRANE (WELDING ONLY)</td>
<td>$106,790</td>
<td>$97,597</td>
<td>$117,740</td>
<td>$139,434</td>
<td>$235,985</td>
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<tr>
<td>CONSULTANT SOLD (incl. Company Match Wat Grants)</td>
<td>$418,368</td>
<td>$404,738</td>
<td>$281,721</td>
<td>$279,422</td>
<td>$322,407</td>
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</table>

BIS Net

<table>
<thead>
<tr>
<th></th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
<th>FY16 YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ (264,617)</td>
<td>$ (431,884)</td>
<td>$ (325,914)</td>
<td>$ (290,199)</td>
</tr>
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</table>
FTEs

All high school FTE’s are removed as they do not count in state reporting.

Headcount
Appendix C – Staffing Model

BIS Organization Chart (Proposed)

Western BIS Org Chart

VP of Academics (Roger Stanford)

Dean of Workforce and Economic Development (Patti Balacek)

Welding Trainer (At Trane) (Mike Szczesny)

Welding Trainer (At Trane) (Michael Loech)

BIS Manager (Angie Martin)

Operations

Contract Specialist (Niki Pelowsky)

Finance/Data

Data Specialist (Britt Pegor)

Marketing

Marketing and Prof Dev Specialist (Kim Anderson)

Sales

Sales Lead/Perf Consultant (John Zimpich)

Performance Consultant (Kim Granum)

Perf Consultant/Lean Trainer (Steve McCranie)
### Administrative Job Description

**Job Title:** Dean - Workforce & Economic Development  
**Originated Date:** February 28, 2011

**Unit:** Academic Affairs  
**Div/Dept:** Business & Industry Services  
**Last Revised Date:** June 30, 2016

**Reports to:** Vice President of Academic Affairs

**Summary of Position:**
Oversee the Business and Industry Services unit, cultivate and enhance industry partnerships and serve as the workforce and economic development representative for the college in the Western service area.

<table>
<thead>
<tr>
<th>Function #</th>
<th>Essential Functions: (related to all College positions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Maintain and uphold the College values of Learning, Excellence, Accountability, Diversity, Student Success, Teamwork, Integrity, and Respect.</td>
</tr>
<tr>
<td>2.</td>
<td>Complete all required College training and responsible for maintaining the skills necessary to complete the essential functions of the position as defined by the department.</td>
</tr>
<tr>
<td>3.</td>
<td>Perform other duties as assigned.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Function #</th>
<th>Essential Functions: (specific to Division/Department/Position)</th>
</tr>
</thead>
</table>
| 1.         | **Strategic and Financial Planning**  
**Supporting Actions May Include:**  
- Oversee all Western contracts (38.14) and state reporting  
- Maintain a financial reporting system that reflects the full financial results of the Division  
- Manage and develop large projects which may include grants through Western or through other partner organizations.  
- Oversee the development of a strategic business plan and effective infrastructure to support the activities of the Division and other assigned units which guides decision making and daily activities |
| 2.         | **Supervise the work of others**  
**Supporting Actions May Include:**  
- Hire, supervise, evaluate and develop management and sales employees for the Division  
- Oversee the work of the division to function like a business within the College |
| 3.         | **Partnerships and Economic Development**  
**Supporting Actions May Include:**  
- Serve as the economic development contact for Western on appropriate boards, committees and projects/grants.  
- Determine, cultivate and bring to fruition industry partnerships within all areas of the college.  
- Work with the Western Foundation Executive Director to assist in the growth of scholarships and donations.  
- Serve as the Executive Director of the Sustainability Institute  
- Grow the relationship between businesses and college through multiple avenues of engagement. |
4. **Manage customer relations**

   *Supporting Actions May Include:*
   - Develop and maintain relationships with College educational divisions, Regional Learning Centers, District-wide business and industry representatives and economic development agencies and Government entities.
   - Delivers presentations when necessary and serves on appropriate boards, committees and alliances to support businesses and the community.

<table>
<thead>
<tr>
<th>Minimum Education Requirements:</th>
<th>Required Certification/Licenses:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master’s degree required in related field.</td>
<td>Eligible for/or meets WTCS Instructional Supervisor certification which includes occupational, teaching, and professional experience</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Minimum Experience Requirements:</th>
<th>Required Testing:</th>
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</thead>
<tbody>
<tr>
<td>Minimum of 4 years in related field.</td>
<td>N/A</td>
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</table>

*Note: This is in addition to any educational and certification requirements*

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<tr>
<th>Work Group:</th>
<th>FLSA Status:</th>
<th>Job Classification:</th>
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<td>D62</td>
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<tr>
<td></td>
<td>☐ Non- Exempt</td>
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</tr>
</tbody>
</table>

**Planning, Policy & Instruction Committee**

September 20, 2016
Administrative Job Description

<table>
<thead>
<tr>
<th>Job Title:</th>
<th>BIS Manager (Operations/Marketing)</th>
<th>Originated Date:</th>
<th>June 29, 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit:</td>
<td>Academic Affairs</td>
<td>Div/Dept:</td>
<td>Business &amp; Industry Services</td>
</tr>
<tr>
<td>Last Revised Date:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reports to: Dean of Workforce and Economic Development

Summary of Position:
Manage operations, marketing and sale of the contract training and professional development offerings requiring the exercise of independent judgment and discretion as well as the utilization of technical, supervision and administrative skills.

<table>
<thead>
<tr>
<th>Function #</th>
<th>Essential Functions: (related to all College positions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Maintain and uphold the College values of Learning, Excellence, Accountability, Diversity, Student Success, Teamwork, Integrity, and Respect.</td>
</tr>
<tr>
<td>2.</td>
<td>Complete all required College training and responsible for maintaining the skills necessary to complete the essential functions of the position as defined by the department.</td>
</tr>
<tr>
<td>3.</td>
<td>Perform other duties as assigned.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Function #</th>
<th>Essential Functions: (specific to Division/Department/Position)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Manage the contract training process and supervise operations/fulfillment (40%)</td>
</tr>
<tr>
<td></td>
<td><strong>Supporting Actions May Include:</strong></td>
</tr>
<tr>
<td></td>
<td>Supervise the operations and fulfillment staff for the Business and Industry Services</td>
</tr>
<tr>
<td></td>
<td>Manage customer-relations</td>
</tr>
<tr>
<td></td>
<td>Direct the sales contract training process to include problem solving, revisions regarding sales contract terms to ensure customer satisfaction</td>
</tr>
<tr>
<td></td>
<td>Direct and manage the training schedule and work with the operations/inside sales staff to fulfill contract(s) keeping in mind both instructional and equipment capacity</td>
</tr>
<tr>
<td></td>
<td>Interview, evaluate and contract with instructors</td>
</tr>
<tr>
<td></td>
<td>Insure timely quoting and follow-up</td>
</tr>
<tr>
<td></td>
<td>Oversee the department software systems</td>
</tr>
<tr>
<td></td>
<td>Manage all WAT grants from planning and budgeting to fulfillment and final reports.</td>
</tr>
<tr>
<td></td>
<td>Collaborate with sales staff as needed to secure sales through mentoring and development of sales proposals and contracts</td>
</tr>
<tr>
<td>2.</td>
<td>Manage the Marketing, Professional Development and product development initiatives. (30%)</td>
</tr>
<tr>
<td></td>
<td><strong>Supporting Actions May Include:</strong></td>
</tr>
<tr>
<td></td>
<td>Supervise the Marketing Specialist position within BIS</td>
</tr>
<tr>
<td></td>
<td>Develop and oversee all marking initiatives including the creation of a marketing plan with timelines.</td>
</tr>
<tr>
<td></td>
<td>Direct the professional development course offerings including selection, marketing and implementation.</td>
</tr>
<tr>
<td></td>
<td>Work with staff to choose the headliner event and oversee all aspects of implementation.</td>
</tr>
<tr>
<td></td>
<td>Oversee the development of new products for all BIS initiatives.</td>
</tr>
<tr>
<td>3.</td>
<td>Administrative/Budgetary (30%)</td>
</tr>
<tr>
<td></td>
<td><strong>Supporting Actions May Include:</strong></td>
</tr>
</tbody>
</table>
- Monitor the Key Performance Indicator’s and metrics in partnership with the Dean.
- Create and monitor the BIS Budget in partnership with the Dean.
- Collaborate with sales team to ensure proper flow of information to address time-sensitive customer requests
- Analyze profitability and outcomes of course offerings and contracts
- Sit on appropriate internal and external committees.
- Conduct contract reviews, update, finalize and confirm

<table>
<thead>
<tr>
<th>Minimum Education Requirements:</th>
<th>Required Certification/Licenses:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor’s degree or equivalent education and/or experience in related field totaling 7 yrs. (14,000 hrs.).</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Minimum Experience Requirements:</th>
<th>Required Testing:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum of 3 years in related field.</td>
<td></td>
</tr>
<tr>
<td><em>Note: This is in addition to any educational requirements</em></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work Group:</th>
<th>Job Classification:</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLSA Status:</td>
<td>C42</td>
</tr>
<tr>
<td>☒ Exempt</td>
<td>☐ Non- Exempt</td>
</tr>
</tbody>
</table>
### Summary of Position:
The Professional Development and Marketing Specialist will perform a wide range of support functions as they relate to Business and Industry Services (BIS) marketing plan fulfillment, sales support, and professional development classes. Complete promotional duties to meet an established marketing timetable, research market segments to identify sales opportunities for BIS, and provide support to the BIS sales staff as needed. Conduct product development and research of open enrollment, seminar and contract class offerings. Complete fulfillment of open enrollment, seminar, and online BIS classes. Communicate with internal college staff and adjunct instructors.

<table>
<thead>
<tr>
<th>Function #</th>
<th>Essential Functions: (related to all College positions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Maintain and uphold the College values of Learning, Excellence, Accountability, Diversity, Student Success, Teamwork, Integrity, and Respect.</td>
</tr>
<tr>
<td>2.</td>
<td>Complete all required College training and responsible for maintaining the skills necessary to complete the essential functions of the position as defined by the department.</td>
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<td>3.</td>
<td>Perform other duties as assigned.</td>
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</table>

<table>
<thead>
<tr>
<th>Function #</th>
<th>Essential Functions: (specific to Division/Department/Position)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Marketing Fulfillment</strong>&lt;br&gt;<strong>Supporting Actions May Include:</strong>&lt;br&gt;• Manage BIS digital media marketing activities&lt;br&gt;• Oversee the implementation of BIS print promotional campaigns&lt;br&gt;• Coordinate promotional events for BIS&lt;br&gt;• Maintain the supply of promotional collateral material&lt;br&gt;• Accountable for the marketing timetable</td>
</tr>
<tr>
<td>2.</td>
<td><strong>Sales Support</strong>&lt;br&gt;<strong>Supporting Actions May Include:</strong>&lt;br&gt;• Conduct market research to identify sales opportunities and market segment growth potential&lt;br&gt;• Coordinate focus groups and customer surveys to include the summarizing data for analysis&lt;br&gt;• Follow-up on inbound customer leads and inquires&lt;br&gt;• Provide internal support to BIS sales staff as needed</td>
</tr>
<tr>
<td>3.</td>
<td><strong>Professional Development</strong>&lt;br&gt;<strong>Supporting Actions May Include:</strong></td>
</tr>
</tbody>
</table>
- Product Development and research for BIS seminars, open enrollment, and state prison contracts
- Scheduling and coordination of BIS Open enrollment and seminar offerings
- Communication with customers and instructors for BIS seminars and open enrollment offerings.
- Fulfillment of BIS seminars and open enrollment classes to include registrations, instructor materials and class requirements.
- Oversight of online class offerings through BIS training providers.

<table>
<thead>
<tr>
<th>Minimum Education Requirements:</th>
<th>Required Certification/Licenses: N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Associate Degree or</td>
<td></td>
</tr>
<tr>
<td>• Education combined with appropriate occupational experience in related field totaling 3.5 yrs. (7,000 hrs.) or</td>
<td></td>
</tr>
<tr>
<td>• Occupational experience in related field totaling 3.5 yrs. (7,000 hrs.)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Minimum Experience Requirements:</th>
<th>Required Testing: Word, Excel</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 years preferred in related field</td>
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</tr>
</tbody>
</table>

*Note: This is in addition to any educational requirements*

<table>
<thead>
<tr>
<th>Work Group:</th>
<th>Clerical/Paraprofessional</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLSA Status:</td>
<td>Exempt □  Non- Exempt ☒</td>
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</table>

<table>
<thead>
<tr>
<th>Job Classification:</th>
<th>B22</th>
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</table>
Clerical/Paraprofessionals

**Job Title:** Contract Specialist

<table>
<thead>
<tr>
<th>Unit:</th>
<th>Academic Affairs</th>
<th>Div/Dept:</th>
<th>Business &amp; Industry Services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Originated Date:</strong></td>
<td></td>
<td>Last Revised Date:</td>
<td></td>
</tr>
</tbody>
</table>

**Reports to:** BIS Manager (Operations/Marketing)

**Summary of Position:**
The Contract Specialist will perform a wide range of support functions as they relate to Business and Industry Services (BIS) contract classes and subject matter experts (SME). Acts as the primary point for SME and customer. Completes scheduling and fulfillment functions for all contract classes. Coordinates the purchase of textbooks and supplies for contract classes. Provides exceptional customer service by keeping business contacts and students updated on relevant class information. Facilitates SME meetings with customers, completing necessary cost-outs and contract proposals.

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<thead>
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<th>Function #</th>
<th>Essential Functions: (related to all College positions)</th>
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<tr>
<td>1.</td>
<td>Maintain and uphold the College values of Learning, Excellence, Accountability, Diversity, Student Success, Teamwork, Integrity, and Respect.</td>
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<td>2.</td>
<td>Complete all required College training and responsible for maintaining the skills necessary to complete the essential functions of the position as defined by the department.</td>
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<td>Perform other duties as assigned.</td>
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<tr>
<th>Function #</th>
<th>Essential Functions: (specific to Division/Department/Position)</th>
</tr>
</thead>
</table>
| 4. | **Contract Activities**  
  *Supporting Actions May Include:*  
  - Research costs and coordinate purchase of textbooks and instructional supplies  
  - Prepare cost-out spreadsheet and contract proposals  
  - Facilitate SME and customer meetings at company locations |
| 5. | **Scheduling and Fulfillment**  
  *Supporting Actions May Include:*  
  - Coordinate scheduling of instructor, facilities and technology for BIS contract customers.  
  - Maintain BIS Contract Class Calendar  
  - Track grant funded classes’ completion percent- monitoring for turn back. |
| 6. | **SME Support Activities**  
  *Supporting Actions May Include:*  
  - Review and prepare materials/handouts for all contract classes  
  - Process all SME agreements and submit SME payroll/mileage reimbursements  
  - Capture all BIS adjunct hours for compliance with ACA database requirements  
  - Facilitate new SME onboarding, training, and annual BIS in-service  
  - Archive curriculum used for contract classes |
| 7. | **Customer Service Functions**  
  *Supporting Actions May Include:*  
  - Send contract class confirmations and parking permits as required  
  - Assist in the coordination of student information as required for credit programing |
- Generating certificates and directing wrap-up sessions with sales rep/customer
- Provides support as needed for general BIS calls and inquiries

<table>
<thead>
<tr>
<th>Minimum Education Requirements:</th>
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<tr>
<td>2 years preferred in related field</td>
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*Note: This is in addition to any educational requirements*

<table>
<thead>
<tr>
<th>Work Group: Clerical/Paraprofessional</th>
<th>Job Classification: B21</th>
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</thead>
<tbody>
<tr>
<td>FLSA Status: □ Exempt □ Non- Exempt</td>
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</tbody>
</table>
# Clerical/Paraprofessionals

<table>
<thead>
<tr>
<th>Job Title: BIS Data Specialist</th>
<th>Originated Date: June 24, 2016</th>
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<tbody>
<tr>
<td>Unit: Academic Affairs</td>
<td>Div/Dept: Business &amp; Industry Services</td>
</tr>
<tr>
<td>Last Revised Date: June 27.2016</td>
<td></td>
</tr>
</tbody>
</table>

## Reports to
Dean of Workforce and Economic Development

## Summary of Position:
Perform a wide range of administrative and office support activities (basic and specific) for the assigned division/department to facilitate the efficient operation of the organization. Perform all accounting and data functions for BIS to facilitate accurate financial and state/federal reporting requirements. Maintain the BIS Dashboard including Key Performance Indicators and all other metrics. Serve as the CRM administrator within the unit. Support and provide backup for other office personnel.

## Function Essential Functions: (related to all support positions)

<table>
<thead>
<tr>
<th>Function #</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td>Maintain and uphold the College values of Learning, Excellence, Accountability, Diversity, Student Success, Teamwork, Integrity, and Respect.</td>
</tr>
<tr>
<td>2.</td>
<td>Perform office functions which may include, but are not limited to: respond to internal/external customers and staff; compile data, create, modify, proofread and edit documents, records, and reports using College standard software; maintain hard copy and/or electronic filing system; monitor inventory and budget information; schedule, coordinate, and prepare materials for meetings and/or appointments.</td>
</tr>
<tr>
<td>3.</td>
<td>Complete all required College training and responsible for maintaining the skills necessary to complete the essential functions of the position as defined by the department.</td>
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<tr>
<td>4.</td>
<td>Perform other duties as assigned.</td>
</tr>
</tbody>
</table>

## Function Essential Functions: (specific to Division/Department/Position)

<table>
<thead>
<tr>
<th>Function #</th>
<th>Essential Functions: (specific to Division/Department/Position)</th>
</tr>
</thead>
</table>
| 8. | **Data Management & Analysis**  
**Supporting Actions May Include:**  
- Monitors BIS metrics by tracking activities, generating reports and summarizing data into dashboards for analysis and trending.  
- Serve as the point of contact for the CRM within Western and stay up to date on all required training.  
- In the CRM, Handle changes to fields, data import/export and/or reports and dashboards.  
- Manage the Evaluation Database (access) and produce reports as needed internal and external customers. |
| 9. | **Fiscal/Accounting**  
**Supporting Actions May Include:**  
- Produce profit and loss, balance sheets and other appropriate documents which allow BIS to run like a business (includes district board reports, and those required by state and federal agencies (DOC, DHS, Federal DOL etc.)  
- Calculate customer invoice amounts and submit all required information to the business office for data processing on a monthly basis.  
- Monitor budget vs. actual expenditures and adjust accordingly. |
- Reconcile every contract upon completion to insure accuracy in state reporting and accounting.
- Process Expense Reports and Credit Card Statements for staff insuring correct account codes.
- Determine all necessary journal entries including payroll for full-time staff, printing, supplies, transcripted credit and others.

**Assign, create and process all 38.14 contracts and Special Projects**

**Supporting Actions May Include:**
- Coordinate with the Wisconsin Department of Corrections to provide certificate programs at local correctional institutions
- Create all contracts in the system and insure all state required data fields are included.
- Create the classes and link to the correct contract and process registrations.
- Responsible for college programs which include but are not limited to: Transcripted Credit, Partnering for Success, Project Circuit, WI Challenge Academy and Apprenticeship
- Serve as the administrative liaison for the 7 Rivers Lean Consortium and New Directions Events.
- Verify all state contract reporting data and work with IT to successfully submit.

**Function #** | **Ancillary Functions: (specific to Division/Department/Position)**
--- | ---
1. | **Provide clerical/administrative support for the department and sales team.**

**Supporting Actions May Include:**
- Customer Service
- Oversee the BIS fleet vehicle usage, maintenance and care.
- Scheduling and fulfillment
- Serve as Admin Asst to the Dean.

**Minimum Education Requirements:**
- Associate Degree (accounting) or
- Education combined with appropriate occupational experience in related field totaling 3.5 yrs. (7,000 hrs.) or
- Occupational experience in related field totaling 3.5 yrs. (7,000 hrs.)

**Required Certification/Licenses:** N/A

**Minimum Experience Requirements:**
2 years preferred in related field (accounting and financial tracking)

*Note: This is in addition to any educational requirements*

**Required Testing:** Word, Excel, Access

**Work Group:** Clerical/Paraprofessional
**FLSA Status:** □ Exempt  ☑ Non-Exempt

**Job Classification:** B21
Appendix D – Marketing Plan

Developed by Angie Martin.    July 1, 2016

Market Definition

The market that Western Technical College BIS operates in can be defined geographically by the district that Western Technical College serves. Our market area encompasses 7 counties in Western Wisconsin with main business hubs in the communities of La Crosse, Arcadia, Black River Falls, Mauston, Sparta, Tomah, and Viroqua. According to 2014 census data, 6511 businesses exist in BIS’s primary market with 60% of them located in La Crosse and Monroe Counties.

In an analysis of customers who did business with Western BIS in FY 2014 thru FY 2016, it is clear that the largest percent of contract training sales currently sold is coming from the manufacturing market segment with 55%. A total of 19% of current sales is coming from the education and government segment, with the remaining 26% fragmented throughout other segments such as healthcare, financial institutions, and service industries.
To implement effective marketing activities and achieve sales growth in FY 2017 and beyond, steps need to be taken to further segment customer information. With better market segmentation data BIS will be able to:

- Identify sales trends in individual industry segments
- Create more targeted promotional campaigns based on products that appeal to specific segments
- Strategically align sales efforts to cultivate opportunities based on market segment or geographic location

Actions steps being taken to incorporate market segmentation data into current business practices include:

- Identifying all current BIS customers by their NAICS industry sector identification and employee count
- Re-evaluating best practices in sales territory coverage to determine effectiveness of alignment by geographic location or industry sector.
- Incorporating industry sector identification as a key element of customer set up in the newly proposed CRM software.

### Competitive Analysis

<table>
<thead>
<tr>
<th>Competitor</th>
<th>PD or Contract Risk</th>
<th>Comments</th>
<th>Competitive Risk Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Consultants</td>
<td>Contract</td>
<td>Most of these organization are from the local market and specialize in topic specific consulting to include, leadership, safety, and computers.</td>
<td>Low</td>
</tr>
<tr>
<td>Contract Training Service Providers</td>
<td>Both</td>
<td>These organizations operate regionally with a local presence. They are highly specialized and are recognized within the industry as experts. Example include Wipfli and the Dahl School of Business.</td>
<td>Medium</td>
</tr>
<tr>
<td>Traveling Training Providers</td>
<td>PD</td>
<td>These organization rarely have a local connection but are nationally recognized. Example include Fred Prior and Skillpath.</td>
<td>Low</td>
</tr>
</tbody>
</table>
Online Training Providers  
Both  
The organizations appeal to learners because they are convenient and often self-paced. They can offer a wide range of training and curriculum is readily available. Once programs are developed multiple people can be trained at a low cost. Example include: Linda.com, Ed2Go, Skillsoft and 360.

Internal Training Departments  
Contract  
Larger organizations staff professional development and training experts to provide internal employees with training options. Locally BIS contracts have been lost to internal departments at Trane and Century Foods (Hormel). Internal departments also have vendor provided training as a resource.

Other Colleges  
Both  
Locally UWL provides specialized professional development opportunities and will contract with local employers. Additionally they house the small business development center. Viterbo is partnering with local business to bring speakers to the market at low to no cost for attendees. UW Stout offers a Manufacturing Outreach Center (MOC) that competes heavily in our market for Lean training. In Minnesota, Winona State and Southeast Technical College house full service training departments similar to BIS.

Chamber/Membership Organizations  
Both  
Chamber of Commerce organizations throughout the district offer educational sessions for low or no cost to chamber members. Additionally both local and national member organizations (some industry specific) provide professional development and certification opportunities.

**Product Strategy**

Western Technical College Business & Industry Services products are made up of three distinct offerings. Within those offerings, various delivery methods and content areas exist.
CONTRACT TRAINING & CONSULTING:

Leadership and Supervision*

- Leadership and Supervision topics will continue to be the door opener to many organizations. By FY 19, to maintain effectiveness:
  
  ➢ Investments need to be made in existing curriculum to include more updated activities and examples.
  
  ➢ An addition is needed in the Critical Core product line to include sessions for executive level leaders.
  
  ➢ The scope and quality of adjunct instructors (SME) available to teach soft skills and leadership topics must be broadened.
  
  ➢ Consideration must be given on how these topics can ladder into Western credit programing. While leadership and supervision topics serve as door openers to organization they also need additional consideration for customization by the SME. Companies often enter into training programs for these areas with deep rooted organizational challenges. This adds to the amount of customization and consultation time needed to develop effective and relevant curriculum.

Safety**
• Safety compliance trainings are a natural fit to manufacturing customers which currently make up 55% of our sales. Industry publications like *Quality Digest*, continue to recommend the outsourcing of safety compliance. An investigation of the most outsourced topics needs to be conducted through focus groups and surveys in FY 17 to determine next steps in developing programing.

*Industrial (CNC, Welding, & EM)*

• Technical, industrial training continues to be a focus area for contract sales in BIS. Following the consortium product model that has been successful for Kirkwood Community College will be key to the growth of these programs in FY 17 and FY 18. Large manufactures in our district employee maintenance technicians on shifts. Mid-size and small manufacturers’ employee smaller numbers of maintenance staff. Both of these scenarios make individual contract training programs logistically challenging or cost prohibitive. By grouping multiple companies together in a consortium a broader reach can be achieved, maximizing training resources.

*Workplace Assessments***

• Currently workplace assessments only make up a very small percentage of overall sales. Strategically however, assessments could be an effective tool for opening doors as initial partnerships with organizations. By the first quarter of FY 18 Western BIS will be aggressively marketing assessment opportunities. To meet demand and generate revenue:
  
  ➢ The Standard Timing Model (STM) needs to be fully revenue generating for BIS (grant period ends September 2017).
  
  ➢ A Standard Electrical Mechanical test needs to be developed and written (May 2017).
  
  ➢ Two additional proctors need to be added for the Ramsey online testing options.
  
  ➢ An investigation of organizational assessment tools needs to be done to determined additional product offerings (currently offer DiSC).
  
  ➢ Pricing needs to be standardized to offer both packages and a la carte options.

*BUSINESS ESSENTIALS PROFESSIONAL DEVELOPMENT & SEMINARS*

*Computers* 

• The standard Microsoft Office offerings for Excel have an 85% run rate for open enrollment professional development classes. Because of the track record of success with these Excel offerings will be expanded to the RLC in FY 17 (with other MS Office products to be determined) supported by targeted postcard mailings. In FY 18 offerings of Google classes will be incorporated into the catalog.

*Business Partners Seminar Series***

• FY 17 will be the third year of the Business Partners Seminar Series. The foundation and product development of the Business Partners Seminar Series is strong and over the originally projected five to eight year timeline it will be a revenue generating series for BIS. A goal for season ticket sales in FY 17 will be 15. Over the next three years the goal will be to grow season ticket holders to a total of 30. Content offerings for the Business Partners Seminar series will be determined annually from data gained through focus groups and employer surveys.

*Annual Headliner Event***

• The annual headliner event for BIS has two primary goals:
Position the Western BIS brand as a leader in bringing employee development trends and “hot topics” to the district we serve.

Cover all costs associated with the event (including a 40% indirect) and generate a minimum of 3% profit margin.

To achieve these goals, BIS must 1) Generate enough sponsorship revenue to cover the cost of the speaker for the event 2) Continue the TV and Radio media partnership for promotional support of the event and 3) Have between 180 - 200 attendees annually.

ONLINE TRAINING OPPORTUNITIES

Ed2Go & UGotClass**

- Ed2Go and UGotClass are online training providers that Western BIS partners with to provide anything from short non-credit training classes to longer non-credit certificate programs. These offerings have never been strategically marketed within the district so minimal data on success is available. The turn-key nature of the programs make them appealing as a product offerings. In FY 17 and FY 18 strategic print marketing will boosts the enrollments for these programs. With this data Western BIS can more accurately measure the success and growth potential for a potential Western BIS branded online product.

Promotional Strategy

The key components of the Western BIS promotional strategy for FY 17 thru FY 19 will be:

- Print Marketing (Estimated 60% of budget allocations)
- Digital Marketing (Estimated 25% of budget allocations)
- Event Based Marketing (Estimated 15% of budget allocations)

Each activity within the promotional strategy will be supported by a content timetable with measurable benchmarks for success. The timetable components consist of:

- Content Creation
- Job Request to College Marketing
- Proof Available
- Approval Date
- Final Production Date
- Distribution Date

Success will be measured on a target of 90% or better for 1) Projects created on time 2) Projects submitted on time and 3) Projects distributed on time.

PRINT MARKETING

<table>
<thead>
<tr>
<th>Product</th>
<th>Distribution Method</th>
<th>Supports Contract, PD or Both</th>
<th>Frequency</th>
<th>Special Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD Catalog</td>
<td>Direct Mail- Rack Distribution Vendor</td>
<td>PD</td>
<td>Bi-annual</td>
<td>Current distribution list is ineffective and new list may need to be purchased.</td>
</tr>
<tr>
<td>Computer Classes (RLC &amp; La Crosse) Postcards</td>
<td>Direct Mail</td>
<td>PD</td>
<td>Bi-annual</td>
<td>Requires purchase of postal code list</td>
</tr>
<tr>
<td>Business Partners Seminar</td>
<td>Direct Mail</td>
<td>PD</td>
<td>Annual</td>
<td>Requires purchase of HR managers list</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------</td>
<td>----</td>
<td>--------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>Online Offerings Postcard</td>
<td>Direct Mail</td>
<td>PD</td>
<td>Annual</td>
<td>Investigate target for mailing</td>
</tr>
<tr>
<td>Chamber Newsletters</td>
<td>Through Local Chambers</td>
<td>Contract</td>
<td>Varies</td>
<td>Generally low cost or included with chamber memberships</td>
</tr>
<tr>
<td>La Crosse Magazine</td>
<td>La Crosse Racks</td>
<td>Contract</td>
<td>Varies</td>
<td>Investigating target and costs</td>
</tr>
<tr>
<td>Press Releases</td>
<td>Free- Local Paper</td>
<td>PD</td>
<td>Varies</td>
<td>No guarantee of publication</td>
</tr>
<tr>
<td>Collateral Folder / Special Promotions</td>
<td>Salesperson personal delivery</td>
<td>Contract</td>
<td>As needed</td>
<td>Supports multiple sell sheets for various products</td>
</tr>
</tbody>
</table>

**DIGITAL MARKETING**

<table>
<thead>
<tr>
<th>Product</th>
<th>Distribution Method</th>
<th>Supports Contract, PD or Both</th>
<th>Frequency</th>
<th>Special Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>Social Media</td>
<td>Both</td>
<td>Daily / Weekly</td>
<td>Active calendar for posting and content required. Purchase of Facebook boosting adds value for minimal investment.</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>Social Media</td>
<td>Contract</td>
<td>Varies</td>
<td>Salesperson Specific- Individual support</td>
</tr>
<tr>
<td>E-Mail</td>
<td>Constant Contact</td>
<td>Both</td>
<td>Varies</td>
<td>Current list is ineffective and not targeted. Low open rate.</td>
</tr>
<tr>
<td>YouTube Channel</td>
<td>Social Media</td>
<td>Contract</td>
<td>Varies</td>
<td>Needs investment of testimonial videos- possible opportunity through WTED</td>
</tr>
<tr>
<td>Webinars</td>
<td>Targeted Invite and Social Media</td>
<td>Contract</td>
<td>Bi-monthly (six per year)</td>
<td>Very targeted topics linked to multi-party contract opportunities, hot topics, or assessments</td>
</tr>
<tr>
<td>Western Technical College Website</td>
<td>College Marketing</td>
<td>Both</td>
<td>As needed</td>
<td>Updates</td>
</tr>
</tbody>
</table>

*Consideration needs to be given to staff development expenses in the area of digital marketing and social media. $2500-$3000 would be needed for two BIS staff members to attend training and take online certification.

**EVENTS**

Local events and sponsorship opportunities will be evaluated individually for effectiveness. Promotional give away items, updated marketing collateral, and staff will be available to attendees or members. Current events include:

- Monroe County Economic Development Conference
- La Crosse Chamber of Commerce Expo
- La Crosse and Monroe County SHRM Events

*Please note that the Headliner event incorporates separate media partners and is not included as part of the above promotional strategy.*
Current Policy

C0700 LEAVE OF ABSENCE

Any time off in excess of two weeks other than approved vacation must be supported by an approved leave of absence. Employees may be granted leaves of absence for various reasons including those required by the master contract agreement or legislation.

Proposed Revision

C0700 LEAVE OF ABSENCE

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Revised September 20, 2016
Revised April 19, 1994
Revised April 18, 1989
Adopted September 23, 1980

Reference: Procedure C0700P