

Modified Workforce Services Balanced Scorecard

Report Specifications

I. PURPOSE

The purpose of the 2017-2018 South Florida Workforce Investment Board's (SFWIB) Balanced Scorecard is to strengthen and make the SFWIB's workforce service delivery system more effective and efficient by simplifying complex measures systems, integrating multilevel performance indicators and focusing on the basics such as employment outcome and self-sufficiency. The Balanced Scorecard includes a comprehensive Job Placement performance measure that is also used as a payment structure to improve employment opportunities for all jobseekers and increase local businesses' competitive advantage in a global economy.

The Balanced Scorecard along with the other operational reports acts as a measurement system, strategic management system, and communication tool. It provides a compass for resource allocation to SFWIB Contractors by sorting and prioritizing dozens of state and federal mandates. It simplifies the complex and perplexing Workforce performance system, which in turn enhances Contractors' ability to allocate human capital and financial resources in areas that shall collectively benefit Region 23's performance.

The SFWIB's performance structure is derived from local, state and federal mandated measures. The comprehensive multilevel performance measures system was used to distinguish the organization's goals and define the Balanced Scorecard measures. This system shall assist the Region in exceeding performance and serving all participants. The graph below illustrates the vertical integration of the multilevel performance measures system.



In the past, the workforce service delivery system has been consistently bombarded with sophisticated methods and techniques used to evaluate performance. Inadvertently, the workforce service delivery system's focus was diverted from the most basic goals such as employment outcome and self-sufficiency. This document describes the report selection criteria, the reporting elements, and logic that shall be used to obtain the different reporting elements. It is organized in three sections; Job Placements, Balanced Scorecard Performance Measures, and Quality Assurance Key Indicators based on the contract requirements. Please refer to the following table for abbreviations used throughout this document.

Acronyms	Systems	Programs
OSST	One-Stop Service	CAP (Welfare Transition) Program and Supplemental
	Tracking	Nutrition Assistance Program (SNAP)
EF	Employed Florida	WIOA Adult (WIOA AD), WIOA Dislocated Worker (WIOA
		DL), Reemployment and Eligibility Assessment (REA), and
		Wagner Peyser (WP) Programs
WFMS	Workforce Management	All Programs
	System	

II. REPORT DETAILS

Data shall be obtained from the OSST, WFMS and EF data warehouse. The state's data warehouse is downloaded nightly into the local data warehouse. As per user specifications, the following methodology was defined:

A. JOB PLACEMENTS

1) Wagner-Peyser (WP) Obtained Employment (OE)

A Wagner-Peyser (WP) Obtained Employment (OE) refers to those individuals who secure employment within 180 calendar days of receiving one or more services which are wholly or partially funded by the state employment service agency, but the placement does not meet the federal definition for a "WP Placement." Credit for an OE may be claimed for any participant who has received any WP **staff assisted** service(s) and has a job start date, where both service and start date fall within 180 days from the date the obtained employment is recorded. A participant must also have a full Employ Florida (EF) registration in the database before the start date of the obtained employment. Complete EF registration is defined as a complete and accurate registration for work (to include a <u>valid</u> telephone number and e-mail address) consisting of the background (education profile and employment history) and the participants resume must be active (updated and viewable) in Employ Florida (EF). Staff must verify that the jobseeker has started working prior to taking credit for an OE. Notification of a hire date will not suffice for securing OE credit.

Data Source: The data will be obtained from EF. EF OE Service Codes: 880, 881, 882, and 883.

2) Wagner-Peyser (WP) Universal Direct Job Placement (DJP)

The SFWIB refers to a WP Placement as a Wagner-Peyser (WP) Direct Job Placement (DJP). A WP Placement as defined by 20 CFR 651.10 is the hiring by a public or private

employer of a fully registered individual referred by the employment office for a job or an interview, provided that the employment office completed all of the following steps:

- i. Prepared a job order form prior to referral, except in the case of a job development contact on behalf of a specific applicant;
- ii. Made prior arrangements with the employer for the referral of a fully registered individual or individual(s);
- iii. Verify the individual has a full EF registration in the Employ Florida (EF) database. The full registration consists of the Background (Education Profile and Employment History), a <u>valid</u> telephone number and e-mail address, Active Resume and must be completed prior to the referral date;
- iv. Referred an individual who may not have been specifically designated by the employer, except for referrals on agricultural job orders for a specific crew leader or worker;
- v. Verified from a reliable source, preferably the employer, that the individual had entered on a job;
- vi. Appropriately recorded the placement in EF; and
- vii. If a participant has been placed in employment by a refugee provider (Direct or Self Placement) in the same program year that participant cannot be entered as a Direct Job Placement.

*Failure to comply with the required steps in sequential order will result in the placement being disallowed. If a placement is disallowed that placement will be removed from the Balance Scorecard and all other SFWIB Reports.

A WP DJP includes a WP Job Development Placement. Title 20 Part 651.10 specifies that a job development means the process of securing a job interview with a public or private employer for a specific applicant for whom the local office has no suitable opening on file.

If there is no suitable opening on file in the Job Bank system, staff should make job development attempts (contacts) on behalf of the job seeker. The job development attempt should be recorded on the job seeker's activity service plan in EF. Job development attempts should be documented on the job seeker's case notes screen by listing the employer's name.

If staff later learns that the jobseeker was hired on the job to which a job development attempt was made, then the staff person should write a job order and take credit for the placement. Once the job order is written to reflect the hire, it must be matched against the job development referral that was previously entered on the job seeker's services screen.

Data Source: The data will be obtained from EF. EF Service Codes: 750, 752, 753, 754,760, 762, 764, 766, 770, 772, 774, 776, 780, 850, 852, 854, 856, 860, 862, 864, 866, 870, 872, 874, and 879.

Note: A DJP for Payment is referred as a Direct Employment

3) Conditions of Job Placements (OE or DJP)

- i. A Job Placement requires a participant to be fully registered in EF. Full registration is defined as registration for work consisting (to include a <u>valid</u> telephone number and email address) of the Background (Education Profile and Employment History) and an Active Resume and must be completed prior to the referral date.
- ii. A Job Placement shall count for performance and payment only if the result is recorded in EF WP during the reporting period of July 1, 2017 – June 30, 2018.
- iii. A Job Placement shall count for performance and payment in the month that the Job Placement was recorded in EF WP.
- iv. A Job Placement shall count only once per distinct social security number (SSN) for the same jobseeker within the period of July 1, 2017 June 30, 2018. Under no circumstance will payment be made for an obtain employment or a direct job placement for individuals registered in Employ Florida with a pseudo and/or unverifiable social security number. If a participant has been placed in employment by a refugee provider (Direct or Self Placement) in the same program year that participant cannot be entered as a Direct Job Placement.
- v. A Job Placement's hire date shall not be a return date to the same employer. There must be a break in employment of at least 120 days and/or show a new hire date if job placement is with the same employer.
- vi. A duplicate (more than one hire reported for same SSN and employer) DJP hire shall count for performance and payment for the initial (first referral) referring center/location in EF WP.
- vii. A Job Placement shall be verified and recorded in EF WP before the soft exit date to be eligible for performance and payment.
- viii. A DJP Job Placement associated with a Seasonal or Temporary period of employment (anticipated duration being 150 days or less of employment) shall not count as WIOA Individualized Job Placement Type and only count as a Universal Job Placement Type for performance and paid at half of the Universal Job Placement rate. Entering job orders that are part-time in nature as a full-time job order will be considered as an attempt to defraud and breach of contract.
- A Job Placement as a result of Self-Employment shall only count as an OE and not a DJP for performance and payment.
- A Job Placement defined as Part-Time (less than 30 hours per week) shall only count as a Universal Job Placement Type for performance and paid at half of the Universal Job

Placement rate. Entering part-time employment opportunities as full-time opportunities will be considered an attempt to defraud and will be disallowed.

- xi. Placements to Volunteer Jobs shall not count towards a Job Placement (DJP or OE) for performance and payment.
- xii. (OE) If the registration office is different than the office that provided a reportable service within 90 days before the hire and the office that provided the reportable service was the only office, then the office that provided the reportable service will be given the OE credit for performance and payment.
- xiii. If the DJP is a WP Job Development, then the job development contact (activity code123) must be on or prior to the hire date and it must be properly documented in EF.

Note: A DJP that is a WP Job Development with a job development contact (activity code 123) on the same date of the hire date is the exception and it shall not be the norm.

4) Types of DJP

i. Universal

Methodology

A Universal DJP refers to a fully registered WP jobseeker in EF that secures a job placement by meeting the federal definition for a "Direct Job Placement," it is not a WIOA enrolled participant and does not meet the criteria for any of the other seven types of DJP. The WP DJP must be recorded in EF during the reporting period. The WP referral create date must be on or prior to the employment start date.

Note: If the DJP is a WP Job Development, then the job development contact (activity code 123) must be on or prior to the hire date.

Data Source: The data will be obtained from EF WP.

ii. WIOA Individualized Adult/DW

Methodology

A WIOA Individualized Adult or DW DJP refers to an eligible fully registered WIOA Adult or DW Participant in EF that secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment date does not occur on the same date. The WP DJP result date must be recorded in EF WIOA during the WIOA participation period before the program's exit. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EF WP and EF WIOA.

iii. WIOA Individualized Job Seekers with Disabilities

Methodology

A WIOA Individualized Job Seeker with a Disability refers to an eligible fully registered WIOA Adult or DW Participant that is identified in EF to have a disability and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment date does not occur on the same date. The WP DJP result date must be recorded in EF WIOA during the WIOA participation period before the program's exit. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EF WP and EF WIOA.

iv. WIOA Individualized Veterans or Ex-Offenders

Methodology

A WIOA Individualized Veteran or Ex-Offender refers to an eligible fully registered WIOA Adult or DW Participant that is identified in EF as a Veteran or an Ex-Offender and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment date does not occur on the same date. The WP DJP result date must be recorded in EF WIOA during the WIOA participation period before the program's exit. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EF WP and EF WIOA.

v. WIOA Individualized Reemployment Assistance (RA) Claimant or Homeless Person

Methodology

A WIOA Individualized Reemployment Assistance (RA) Claimant refers to an eligible fully registered WIOA Adult or DW Participant that is identified in EF or the State RA system as a recipient of Reemployment Assistance and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment date does not occur on the same date. A Homeless Person refers to an eligible WIOA Adult that is identified in EF as meeting the United States Department of Housing and Urban Development's definition of a Chronically Homeless Person at the time of registration and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment date does not occur on the same date. The WP DJP result date must be recorded in EF WIOA and occur within six months of the WIOA application date. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EF WP and EF WIOA.

vi. WIOA Individualized TANF/Career Advancement Program (CAP) or Supplemental Nutrition Assistance Program (SNAP)

Methodology

A WIOA Individualized TANF/Career Advancement Program (CAP) or Supplemental Nutrition Assistance Program (SNAP) DJP refers to an eligible fully registered WIOA Adult or DW Participant that is identified in OSST as a CAP or SNAP participant and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment date does not occur on the same date. The WP DJP result date must be recorded in EF WIOA during the WIOA participation period before the program's exit. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EF WP, EF WIOA, OSST CAP, and OSST SNAP.

Criteria for a WIOA Individualized TANF/CAP DJP: Employment information shall also be recorded in OSST and the hire date must be after a full month of CAP mandatory participation period before the CAP program's closure and during the reporting period. If the placement occurs during the first month in CAP then at least one hour of participation must be recorded in OSST.

Criteria for a WIOA Individualized SNAP DJP: SNAP participants with employment hire date on or after being actively engaged in a qualifying SNAP component with at least one JPR hour recorded in OSST during the reporting period. Employment information shall also be recorded in OSST.

B. BALANCED SCORECARD PERFORMANCE MEASURES

1) Training Completion Rate

Methodology

The measure consists of those WIOA, TAA, and CAP participants who completed training in WFMS divided by the number of participants who enrolled in training in WFMS and received a training voucher that was paid with a completion or any of the closure reasons.

A training account with a paid training voucher and one of the following completion reasons "Never Attended (NE), Training Program Transfer (TT), or Cancelled Enrollment (CE)" shall be in the denominator as follows:

- NE If a training account ends with completion reason of NE and the participant received a training voucher that was paid for by the same training account, then the training account shall be calculated in the denominator.
- TT If a training account ends with completion reason of TT and the participant is not enrolled in training on or after the actual end date of the transfer, then the training account shall be calculated in the denominator.
- CE This option is no longer available in WFMS. However, if a training account ends with completion reason of CE, then the training account shall count in the denominator.

The total # of participants who completed training in WFMS with a paid training voucher

Divided by total # of participants who show a completion or any of the closure reasons with a paid training voucher

Data Source: The data on the completion of the training is collected and analyzed using WFMS.

2) Training Completion Placement Rate

Methodology

The measure consists of those participants who completed training and obtained employment within 180 days of training completion divided by the number of participants who completed training within 180 days of training completion during the reported period.

The total # of participants who completed training and obtained employment within 180 days of training completion

Divided by the total # of participants who completed training within 180 days of training completion

Data Source: Training completion information is collected and analyzed using WFMS. The placement information is obtained from EF, OSST, and WFMS.

3) Training Related Placements Rate

Methodology

The measure consists of those participants who completed training, obtained employment and have been placed in a training related occupation within 180 days of training completion divided by the number of participants who completed training and were placed within 180 days of training completion during the reported period.

The total # of participants who completed training, obtained employment and have been placed in training related occupation within 180 days of training completion during the reported period

Divided by the total # of participants who completed training and obtained employment within 180 days of training completion during the reported period

Data Source: Training completion and training occupational codes are collected and analyzed using WFMS. The placement information and occupational codes (O*Net) codes are obtained from EF and WFMS systems. The O*Net codes are used to map the training occupations with the placement occupations.

4) Training Enrollments

Methodology

This measure consists of the number of WIOA eligible participants enrolled in qualified WIOA ITAs, On the Job Training, and Paid Work Experience in EF and WFMS for the reporting period.

Data Source: The data will be obtained from EF and WFMS.

5) CAP All Family Participation Rate

Methodology

The measure consists of the total number of families (mandatory participants) receiving TANF including a work eligible adult or minor head-of-household who is engaged in work activity for the month divided by the total number of mandatory participants receiving Temporary Cash Assistance (TCA).

The total # of CAP mandatory participants engaged in a Federal allowable countable activity

Divided by the total # of CAP mandatory participants receiving TCA

Data Source: The data shall be obtained from the OSST.

6) Career Advancement Program (CAP) Entered Employment Rate

Methodology

The measure consists of the number of all CAP mandatory cases that close with employment divided by the total number of closures within the reporting period.

The total # of all mandatory cases that close with employment

Divided by the total # of mandatory cases that close within the reporting period

Data Source: The data shall be obtained from the OSST system.

7) Wagner Peyser (WP) Entered Employment Rate

Methodology

The number of all Wagner-Peyser participants unemployed at enrollment that were placed at exit divided by all the WP participants unemployed at enrollment that have exited. Exits are defined as participants who have not had a service within three (3) months from the last reportable service.

The total # of all WP participants placed at exit

Divided by the total # of all WP participants who exit

Data Source: The data shall be obtained from the EF WP.

8) WIOA Adult and Dislocated Worker Entered Employment Rate

Methodology

Measures the percent of those WIOA Adults and Dislocated Workers participants unemployed at registration and placed at exit divided by all the Adults and Dislocated Workers participants unemployed at registration who exit.

The total # of all Adult participants placed at exit

Divided by the total # of Adult and Dislocated Worker participants who exit

Data Source: The data shall be obtained from the EF WIOA.

9) Short-Term Veterans Entered Employment Rate

Methodology

The measure consists of the number of exiting Veterans who were placed in EF in the 90 days following their exit date divided by the number of Veteran participants who were unemployed at their date of participation and were exited after 90 days.

The total # of exiting Veterans who were placed within 90 days of the exit date

Divided by the total # of Veteran participants who were unemployed at their date of participation and were exited after 90 days

Data Source: The data shall be obtained from the EF.

10) Employers Served (Employer Penetration Rate)

Methodology

The measure consists of the total number of new Employers that have received (for the first time during the program year for the Region) at least one of the following levels of service and recorded in EF:

Level I (Highest Service Level): Includes services such as pre-screening; job orders; veteran services; customized training; job referrals/placements, job fairs; on-site workshops for recruitment/retention.

Level 2 (Mid-Level Services): Includes services such as referrals of qualified applicants; work readiness certifications; employer notifications of potential applicants.

Level 3 (Lowest Level of Service): Includes services such as employer contacts; promotional calls; providing information packages; business incentive information.

Data Source: The data will be obtained from EF WP.

11) Employers Served with Level I Services

Methodology

The measure consists of the total number of the new Employers that have received a Level I Service and is recorded in EF for the first time during the Program Year (PY) for the Region.

Data Source: The data will be obtained from EF WP.

12) Jobs Openings Filled Rate

Methodology

The measure has been defined as the number of (staff and employer initiated job openings filled) from the job orders in the Job Order Index measure divided by the total number of (staff and employer initiated job openings) in the job orders. The job orders to be excluded in the measure are: those on hold or are still open.

The total # of job openings filled in the job orders

Divided by the total # of job openings in the job orders

Data Source: The data will be obtained from the EF system.

13) Referral Job Skills Match Average

Methodology

The measure has been defined as the average job skills match of the job seeker to the skills requested in the job order. This applies to all staff issued referrals during the reporting period.

Data Source: The data will be obtained from the EF system.

14) Employment (Obtain Employment and Direct Job Placements)

Methodology

The measure consists of the total number of Direct Job Placements (DJP) and Obtained Employment (OE) in EF during the reporting period.

Data Source: The data will be obtained from EF.

15) Employed 2nd Qtr After Exit

Methodology

The measure consists of those WIOA participants who exit and are employed in the second quarter after exiting. It is divided by the number of WIOA participants who exit during the reported period.

The total number of WIOA participants who obtained employment at the 2nd Quarter mark, post exit.

Divided by the total # of WIOA participants who exit during the reporting period.

Data Source: EF, Work number, wage credit.

16) Employed 4th Qtr After Exit

Methodology

The measure consists of those WIOA participants who exit and are were employed in the fourth quarter after exiting. It is divided by the number of WIOA participants who exit during the reported period.

The total number of WIOA participants who obtained employment at the 4th Quarter mark, post exit.

Divided by the total # of WIOA participants who exit during the reporting period.

Data Source: EF, Work number, wage credit.

17) Average Days to Employment

Methodology

This measure has been defined as the total number days its takes a job seeker to attain employment after registering in EF. The measure will consider both Direct Job Placements and Obtain Employment, after the WP EF registration/participation date. All hire dates shall be within the reporting period.

Data Source: The data shall be obtained from the EF systems.

18) Employment /Job Placement Average Wage

Methodology

The measure consists of the sum of the hourly wages of all the WP Job Placements (DJPs only) divided by the number of WP Job Placements in EF during the reporting period.

The sum of the hourly wages (DJP's only)

Divided by # of WP job placements

Data Source: The data will be obtained from EF WP DJPs.

19) Cost Per Placement

Methodology

The measure consists of the total contract award earned plus the WFMS allocations (obligated and paid) and share of facilities cost divided by the total number of Job Placements.

The total contract award earned plus the WFMS allocations (obligated and paid) and share of facilities cost

Divided by the total # of Job Placements

Data Source: The job placement information is obtained from EF.

20) Net Economic Benefit

Methodology

The measure consists of the Annual Placement Average Wage subtracted by the Cost per Placement.

(Placement Avg. Wage x 2080 hours) - (Cost per Placement) = (The Net Economic Benefit per Placement)

Data Source: The job placement information is obtained from EF.

21) Return on the Investment

Methodology

The measure consists of the Net Economic Benefit per Placement divided by the Cost per Placement.

The Net Economic Benefit per Placement

Divided by the Cost per Placement

Data Source: The placement information is obtained from EF.

C. QUALITY ASSURANCE KEY INDICATORS

1) Outreach to Jobseekers

Methodology

This measure consists of the number of jobseekers enrolled in EF with at least one (reportable) staff assisted service recorded in EF.

Data Source: The data will be obtained from the WP Incomplete Registration Report.

2) Work Registration – Initial Assessment

Methodology

This measure consists of the number of jobseekers enrolled in EF with an IAA (full) registration for work divided by the number of jobseekers enrolled in EF with at least one staff assisted service recorded.

Data Source: The data will be obtained from the WP Incomplete Registration Report.

3) Work Registration – EF Complete Registrations

Methodology

This measure consists of the number of fully registered jobseekers enrolled in EF with at least one recorded staff assisted service divided by the total number of jobseekers (full and partial registration) enrolled in EF with at least one staff assisted service recorded.

Note: Complete EF registration for work consists of the Background (Education Profile and Employment History) and Resume.

Data Source: The data will be obtained from the WP Incomplete Registration Report.

4) Quality of Jobseeker Referrals to Jobs

Methodology

This measure consists of the number of jobseekers referred to job orders EF by staff divided by the number of staff referrals made to job orders in EF.

Data Source: The data will be obtained from the WP Referral to Placement Ratio Report.

5) Follow-up with Jobseeker Referrals to Jobs

Methodology

This measure consists of the number of EF WP job orders that are "Expired, Fully Referred, or on Hold" and the total number of EF WP job orders that are "Open".

Data Source: The data will be obtained from the WP Job Order Report.

6) Manage Exits/Follow-up

Methodology

This measure consists of the number of jobseekers exiting EF WP with employment divided by the number of jobseekers exiting EF WP.

Data Source: The data will be obtained from the WP Soft Exit Application/Report.

7) Manage Job Orders/Follow-up with Employers

Methodology

This measure consists of the number of EF WP job orders that are "Expired, Fully Referred, or on Hold" and the total number of EF WP job orders that are "Open".

Data Source: The data will be obtained from the WP Job Order Report.

8) Average Duration of Jobseekers Unemployed

Methodology

This measure consists of the average length of time all the WP Jobseekers were unemployed since the WP enrollment date with no job placement on its current EF Application ID history.

Data Source: The data will be obtained from the WP Incomplete Registration Report and Unemployment Tool.

9) Manager TANF/CAP Caseload

Methodology

This measure consists of the number of items met on the CAP Review Tool divided by all the items on the CAP Review Tool.

Data Source: The data will be obtained from the CAP Review Tool.

10) Outreach to Employers Report – Employer Penetration Report

Methodology

This measure consists of the percent increase of new employers served for the first time during the program year divided by last program year's total number of new employers served.

Data Source: The data will be obtained from the Employer Penetration Report.

11) Supplemental Nutrition Assistance Program (SNAP) Engagement

Methodology

This measure consists of the number of SNAP participants referred by DCF that are assigned to countable activities and have a minimum of one JPR hour logged in OSST.

Data Source: The data will be obtained from OSST.