



Balanced Scorecard Specifications

Report Specifications

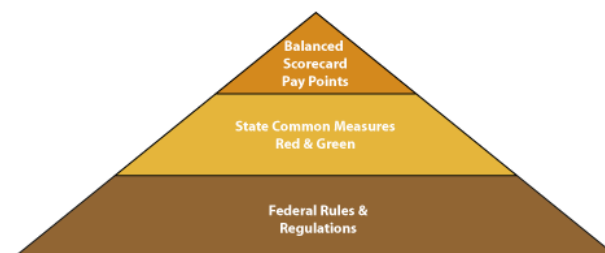
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I. PURPOSE

The purpose of the 2013-2014 South Florida Workforce Investment Board (SFWIB) Balanced Scorecard is to strengthen our workforce service delivery system and to become highly 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 is a pay point structure that provides the corner stone for the organizational cultural change necessary to embrace practical and versatile business solutions to improve employment opportunities for all jobseekers and increase our businesses competitive advantage in a global economy.

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

The SFWIB pay point structure is derived from the 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 sections based on the report requirements provided by staff. Please refer to the following table for abbreviations used throughout this document.

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

II. REPORT DETAILS

Data shall be obtained from the OSST, SAMS and EFM 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. REQUIRED MEASURES (100%) - PER CENTER

1) *Level of Services Indicator for Special Customer Groups*

Methodology

The measure consists of WIA and WP special customer groups served and shall equate **90 percent** of the level of services per center. The allocated percent is calculated based on the center’s percentage of the total (administrative, programmatic, SAMS, and DEO staffing allocations) funding allocation excluding SNAP and CAP funding divided by the Region’s total funding. The measure is calculated using the Center’s funding percentage times **90 percent**.

Note: Adult Programs special groups include the disabled, veterans, and offenders.

- $$\frac{\text{The total \# of WIA and WP special customer groups served by center}}{\text{Divided by The total \# of WIA and WP special groups served in the region}}$$

Data Source: The data for this measure is collected and analyzed using the EFM system.

2) *Training Completion Rate*

Methodology

The measure consists of those WIA, TAA, and CAP participants who completed training in SAMS divided by the number of participants who enrolled in training in SAMS, received a training voucher, and the training voucher 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 filtered from the denominator as follows:

- NE – If a training account ends with completion reason of NE and the participant received a training voucher and the training voucher was paid for 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 SAMS. However, if a training account ends with completion reason of CE, then the training account shall count in the denominator.
 - $$\frac{\text{The total \# of participants who completed training in SAMS with a paid training voucher}}{\text{Divided by total \# of participants who show a completion or any of the closure reasons with a paid training voucher}}$$

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

3) *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.

- $$\frac{\text{The total \# of participants who completed training and obtained employment within 180 days of training completion}}{\text{Divided by the total \# of participants who completed training within 180 days of training completion}}$$

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

4) *Training Related Placements*

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.

- $$\frac{\text{The total \# of participants who completed training and obtained employment and have been placed in training related occupation within 180 days of training completion during the reported period}}{\text{Divided by the total \# of participants who completed training and obtained employment within 180 days of training completion during the reported period}}$$

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

5) *Employment After Services*

Methodology

The measure consists of the total number of all unduplicated employments after services per center and per year. The following methodology was defined per program:

- **Wagner Peysner** – all placements as a result of a referral to a job order.
- **CAP** – unsubsidized placements entered in the OSST system.
- **SNAP** – unsubsidized placements entered in the OSST system.
- **WIA Adult and Dislocated Workers** – same as the WIA Employment Gateway measure.
 - The total # of participants who obtained employment. All hire dates shall be within the reporting period.

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

6) *Employment After Services within 90 Days After Work Registration*

Methodology

The measure consists of the total number of all unduplicated employments after services per center and per year within 90 days after work registration/enrollment in WP EFM. The following methodology was defined per program:

- The total # of participants who obtained employment within 90 days after work registration/enrollment in WP EFM. All hire dates shall be within the reporting period.

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

7) *Cost Per Placement*

Methodology

The measure consists of the Career Center's total contract award plus the SAMS allocations and DEO staff cost (total salaries of all WP staff assigned) divided by the total number of Employment After Services.

- $$\frac{\text{The Career Center's total contract award plus the SAMS allocations and DEO staff cost (total salaries of all DEO staff assigned)}}{\text{Divided by the total \# of Employment After Services}}$$

Data Source: The placement information is obtained from EFM, OSST, and SAMS.

8) *Jobs Openings Filled Rate (Gateway to Job Openings Index)*

Methodology

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

- $$\frac{\text{The total \# of job openings filled in the job orders}}{\text{Divided by the total \# of job openings in the job orders}}$$

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

9) *Job Openings Index*

Methodology

The number of all new job openings entered during the reporting period. Labor certification is excluded in the calculation of the Career Center performance.

- # of new job openings added in EFM during the reporting period

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

10) Quality Assurance Measures / Per Center - (10%)

a) WP Incomplete Registrations Report / IAA (Full) Registration

Methodology

This measure consists of the number of customers enrolled in EFM with an IAA (full) registration for work over the number of customers enrolled in EFM with at least one staff assisted service recorded.

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

b) WP Incomplete Registrations Report / EFM (Complete) Registration

Methodology

This measure consists of the number of customers enrolled in EFM with at least one staff assisted service recorded that have a complete EFM registration for work over the number of customers enrolled in EFM with at least one staff assisted service recorded.

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

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

c) WP Referral to Placement Ratio

Methodology

This measure consists of the number of customers referred to job orders EFM by staff over the number of staff referrals made to job orders in EFM.

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

d) WIA Enrollments

Methodology

This measure consists of the number of customers enrolled in the WIA Adult and/or Dislocated Program from the WP enrolled customers:

- Have received at least one staff assisted service; and
- Have a complete EFM registration.

Data Source: The data will be obtained from the WP Incomplete Registrations and EFM.

e) WP Soft Exit Application/Report

Methodology

This measure consists of the number of customers exiting EFM WP with employment over the number of customers exiting EFM WP.

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

f) WP Job Order Report

Methodology

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

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

g) CAP Review Tool

Methodology

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

Data Source: The data will be obtained from the CAP Review Tool (System Generated).

h) Staffing Requirements

Methodology

This measure consists of the number of positions filled over the number of positions in budget.

Data Source: The data will be obtained from the budget and staffing roster.

i) Individual Training Account (ITA) Enrollments

Methodology

This measure consists of the number of WIA eligible participants enrolled in qualified WIA ITAs (that include On the Job Training and Paid Work Experience) in EFM and SAMS for the reporting period.

Data Source: The data will be obtained from EFM and SAMS.

j) CAP File Review

Methodology

This measure consists of the number of elements in compliance reviewed over the number of elements reviewed for the program.

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

k) WIA File Review

Methodology

This measure consists of the number of elements in compliance reviewed over the number of elements reviewed for the program.

Data Source: The data will be obtained from the WIA File Review.

l) WP Program Review

Methodology

This measure consists of the number of elements in compliance reviewed over the number of elements reviewed for the program.

Data Source: The data will be obtained from the WP File Review.

m) SNAP File Review

Methodology

This measure consists of the number of elements in compliance reviewed over the number of elements reviewed for the program.

Data Source: The data will be obtained from the SNAP File Review.

n) REA File Review

Methodology

This measure consists of the number of elements in compliance reviewed over the number of elements reviewed for the program.

Data Source: The data will be obtained from the REA File Review.

11) *WP Entered Employment Rate*

Methodology

The number of all Wagner Peyser participants placed during the 90 days following their exit date. Exits are defined as participants who have not had a service within the next 3 months from the last reportable service in the reporting period.

- $$\frac{\text{The total \# of all WP participants placed at exit}}{\text{Divided by the total \# of WP participants who exit}}$$

Data source: The data shall be obtained from the EFM system.

12) *WIA Adult and Dislocated Worker Entered Employment Rate*

Methodology

Measures the number of those adults unemployed at registration and the percent of all Adults and Dislocated Workers placed in employment at exit.

- $$\frac{\text{The total \# of all Adult participants placed at exit}}{\text{Divided by the total \# of Adult and Dislocated Worker participants who exit}}$$

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

13) *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.

- $$\frac{\text{The total \# of all mandatory cases that close with employment}}{\text{Divided by the total \# of mandatory cases that close within the reporting period}}$$

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

14) *CAP All Family Participation Rate*

Methodology

The measure consists of the total number of families receiving TANF including a work eligible adult or minor head-of-household who is engaged in work activity for the month.

- $$\frac{\text{The total \# of CAP participants receiving (TCA) that is engaged in a Federal allowable countable activity}}{\text{Divided by the total \# of CAP participants receiving Temporary Cash Assistance (TCA)}}$$

Data Source: The data shall be obtained from the System Review Tool, OSST, and MMR.

15) *Short-Term Veterans Entered Employment Rate*

Methodology

The measure consists of the number of Veteran exiters who were identified as placed in EFM 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.

- $$\frac{\text{The total \# of Veteran exiters who were identified as placed within 90 days of the exit date}}{\text{Divided by the total \# of Veteran participants who were unemployed at their date of participation and were exited after 90 days}}$$

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

16) Supplemental Nutrition Assistance Program (SNAP) Entered Employment Rate

Methodology

The measure consists of the number of all SNAP participants starting employment after being actively engaged in a qualifying SNAP component with at least one JPR hour recorded in OSST during the reporting period divided by the total number of participants actively engaged in a qualifying SNAP component with at least one JPR hour recorded in OSST during the reporting period.

- The total # of all SNAP participants starting employment after being actively engaged in a qualifying program component with at least one JPR hour recorded in OSST during the reporting period.

Divided by the total # of SNAP participants actively engaged in a qualifying program component with at least one JPR hour recorded in OSST during the reporting period.

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